Research News for the U.S. Travel Industry

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TRAVEL PRINTOUT

US Travel Data Center

October 1991

Volume 20, Number 10

Travel Industry Hopeful of Recovery in 1992

The outlook for the travel industry in 1992 will depend, to a large degree, on the economy, but executives are hopeful that the industry will be rejuvenated as quickly as it has in past recessions, delegates were told at the U.S. Travel Data Center's 17th annual Travel Outlook Forum October 23 in Washington.

Travel industry experts representing all sectors of the industry gathered at the 17th annual Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association (TTRA), to examine the travel industry's future.

Delos Smith, senior business analyst at The Conference Board, began the Travel Outlook Forum with the outlook for the economy. "Although the U.S. economy will be recovering for the rest of this year and in 1992, the recovery will be sluggish and for many people and for many regions of the country it will feel like a recession," noted Smith.

Because of the many unresolved questions, both the consumer and business communities will remain extremely cautious. Smith projected that there does not seem to be a recession ahead but just a period of uneven growth.

"Now that the numbers are in for the first half of 1991, we can see that this double whammy of war and recession has had negative effects on many sectors of the travel industry," said Suzanne Cook, executive director of the U.S. Travel Data Center. Domestic transport volume, passenger-miles traveled by air, rail, bus and auto/truck/recreational vehicles, is flat with virtually no growth over 1990.

According to a Data Center survey of state travel offices, which was released at the Forum, more than half of the states responding indicated that visitation had increased this year, although only modestly. The increases reported tended to reflect greater auto-related visitation with declines generally reported in air travel, reflecting national trends.

More than 76 percent of state travel officials expect increases in visitation in 1992. States across most of the United States share this optimism, with the exception of a few scattered states in the East, according to the Data Center survey.

Inbound travel to the United States will reach a record level of nearly 44 million visitors in 1992, an increase of more than 5 percent, according to Harvey Shields, director, office of research at the United States Travel and Tourism Administration (USTTA). In addition, American outbound travel will increase 9 percent in 1992, with a record number of departures.

Findings from the 1990 census will have major implications for the travel industry, said Dr. Barbara Everitt Bryant, director, Bureau of the Census at the U.S. Department of Commerce. The lifestyles and travel interests of our aging society, median age 33 years old, are very different than they were 10 years ago and present challenges to the travel industry which must provide and market travel products and services to these segments, said Bryant.

The recovery of the economy in 1992 will renew consumer spending and subsequently increase air travel demand 6 percent, predicted David Swierenga, assistant vice president at the Air Transport Association of America. After losing $1.3 billion in 1990, the industry is projected to show a profit of $300 million in 1992. "Renewed growth will mean increases in delays, unless the FAA (Federal Aviation Administration) accelerates efforts to improve the air traffic control system," added Swierenga.

The low rate of supply growth in the lodging industry will enable occupancy rates to increase to 61.7 percent in 1992, but room rates will increase to an average of $60.81, predicted Randell Smith, president, Smith Travel Research. The forecast, which was sponsored by the American Hotel and Motel Association (AH&MA), also indicated that a lack of industry profitability and increased ownership of hotels would be major influences in 1992 and beyond.

Unless there is a turnaround in the second half of 1991, we won't see any increase in the number of people traveling on business, said Henry Brandt, marketing research manager at Official Airline Guides, Inc. Based on the first six months of the U.S. Travel Data Center's *Survey of Business Travelers*, there was a greater proportion of the market taking just one or two business trips a year, fewer who took 3 to 9 trips, while the smallest group - the frequent travelers - held steady in numbers.

(Continued on Page 3).

INSIDE: 1990 Survey of Business Travelers; Travel Prices Decrease in September

Cost of Travel Decreases 2.2 Percent in September

The cost of travel in the United States decreased 2.2 percent in September, the first decrease since last May. The decrease in the cost of travel in September was the largest decrease since September 1989, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. decreased to 144.5 (1982 - 84 = 100) during September.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.4 percent in September and rose to 137.2.

Travel Price Index and Components

September 1991 TPI Component	Monthly % Change August 1991 to September 1991	Annual % Change September 1990 to September 1991
Transportation	-0.5	-5.0
Airline Fares	-1.4	0.7
Other Intercity Trans.	0.7	2.1
Intracity Public Trans.	0.9	4.5
Motor Fuel	0.5	-10.9
Lodging	-6.6	10.1
Food and Beverages Away From Home	0.2	3.5
Entertainment	1.1	5.2
TRAVEL PRICE INDEX	-2.2	3.5
CONSUMER PRICE INDEX	0.4	3.4

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Lodging prices decreased 6.6 percent in September, but in the last 12 months, lodging prices increased 10.1 percent. Overall transportation costs decreased nearly 1 percent and in the last 12 months decreased 5 percent.

Motor fuel showed a slight increase in September, but decreased nearly 11 percent over the past 12 months. It was the second consecutive month that motor fuel prices have decreased in the past 12 months.

Entertainment costs increased more than 1 percent in September, but jumped more than 5 percent over the last 12 months. Intracity public transportation and other intercity transportation showed slight increases of less than 1 percent this past September. In addition, food and beverages away from home increased less than 1 percent.

Over the past 12 months, the TPI increased 3.5 percent, influenced greatly by rising lodging and intracity transportation costs. The CPI rose more than 3 percent over the same 12 month period.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

U.S. Travel Decreases in First Quarter 1991

The volume of travel in the first quarter 1991 showed a slight decrease from the first quarter in 1990, according to preliminary numbers from the Data Center's National Travel Survey.

"The euphoria of U.S. residents after the conclusion of the Gulf War helped increase travel in March, but declines in January and February attributed to a slight decrease in the first quarter of 1991," said Elizabeth Stewart, manager of market research at the Data Center.

There were a total of 238.9 million person-trips in the first quarter of 1991, which includes January, February and March. The 1991 total was a decrease of 0.1 percent over the first quarter of 1990. (A person-trip is one person traveling 100 miles or more away from home.)

The number of trips taken in the first quarter of this year decreased nearly 3 percent. There were a total of 124.2 million trips in the first quarter of last year, compared to 120.8 million trips this year.

There were fewer trips being taken, but more people were on the road compared to the first quarter of last year, according to Stewart.

Preliminary numbers from the Data Center show that travel in April 1991 will show an increase over the previous April. For additional information, contact Elizabeth Stewart at (202) 293-1040.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

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(Continued from Page 1.)

Watts Wacker, executive vice president at Yankelovich Clancy Shulman told delegates that "hassles" associated with free time will be the biggest issue facing leisure travelers in 1992. Demographic groups of 40 - 59 years old and 35 years and older with children will show the largest growth in leisure travel.

The 17th annual Travel Outlook Forum was held in conjunction with the Travel Industry Association of America's (TIA) National Conference on October 24 at the Sheraton Washington Hotel. Proceedings from the forum will be available later this year through the *1992 Outlook for Travel & Tourism* at the cost of $125. For additional information on the forum, contact the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy).*

Meeting, Convention & Trade Shows Remain Popular Among Business Travelers in 1990

Nearly one-half of all business travelers attended a meeting, convention or trade show in 1990, which accounted for nearly one-third of all business trips, according to the U.S. Travel Data Center's *1990 Survey of Business Travelers.*

The report, which is sponsored by the Official Airline Guides (OAG), said that "M & C" travel was again the most significant "purpose" segment of the market.

M & C trips are more likely to last 2 to 3 nights than any other company business trips, and they are more likely to be combined with vacation travel. March, April and January are the most popular months for M & C's.

Visitor Volume at National Parks

Region	August 1991 Visits	% Change from AUGUST 1990	% Change 1991/90*
NEW ENGLAND	2,924,248	-2.8%	-0.3%
MIDDLE ATLANTIC	4,146,461	10.1	8.9
SOUTH ATLANTIC	10,171,921	-1.7	-0.9
EAST SOUTH CENT.	2,318,996	10.6	5.1
EAST NORTH CENT.	1,192,100	4.9	9.7
WEST NORTH CENT.	2,359,124	10.2	8.5
WEST SOUTH CENT.	1,167,672	11.1	-2.2
MOUNTAIN	7,717,279	5.0	1.9
PACIFIC	6,992,147	7.6	2.4
TOTAL	38,989,948	4.2	2.2

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. & Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

Frequent travelers, those who take 10 or more business trips per year, are also an important element of business travel. Frequent travelers took nearly half of all business trips in 1990, 73 million trips.

There were a total of 4.9 million frequent business travelers, who averaged 16.1 trips in 1990, compared to 14 trips last year. The number of business trips that were combined with vacation increased 3 percent in 1990. More than 25 percent of all business travelers in 1990, nearly 9 million, took some vacation with their business trip.

Business travelers were more likely to add vacation time to their trip in the summer months. They were also more likely to use their own car to cover most of the miles, and they were three times more likely than business-only travelers to have stayed with friends and relatives. The Southern Atlantic was the favorite destination for both vacationing and non-vacationing business travelers.

The SBT includes an overview of business travel, characteristics of business trips, a profile of business travelers, purpose of trips, modes of transportation and accommodations. Segments covered in the report include women business travelers, business car rentals, frequent travelers and airline travelers, among others.

The 1990 Survey of Business Travelers is available for $85 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

News at the Data Center

The U.S. Travel Data Center has named Susan Weil as its Manager of Marketing and Membership. Weil's background includes several years of research and sales experience, most recently for a software engineering company in Washington. She holds a Master of International Management degree from the American Graduate School of International Management.

One of Weil's initial responsibilities as Manager of Marketing and Membership at the Data Center will be to increase visibility and capabilities to the Data Center membership of the Data Center's Travel Economic Impact Model (TEIM) and the National Travel Survey (NTS).

The newly revised TEIM is the only national model which produces the economic impact of travel at the national, state and local levels. The NTS is the monthly telephone survey of 1,500 U.S. adults that measures consumer's travel patterns and overall, national and regional travel trends.

In addition, Priya Vasan has joined the survey department as a research assistant. Vasan has a Bachelor of Science degree in Marketing from The George Mason University.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Aug	$5,759	million	5.1	3.9	1.1
Eating and Drinking Places(2)	Sept	$15,904	million	-0.5	4.5	3.9
Gasoline Service Stations(2)	Sept	$10,934	million	0.7	-6.6	2.5
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Aug	62.5	percent	1.8	-1.0	-2.3
Real Demand for Commercial Lodging(4)	Aug	71.9	million	4.1	2.9	0.3
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Sept	25.5	billion	-22.03	-2.1	-2.9
Int'l Revenue Passenger-Miles	Sept	11.0	billion	-18.6	5.1	-4.3
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Aug	52.6	billion	2.1	1.8	0.5
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Aug	635.9	million	5.2	4.8	3.5
	Sept	466.0	million	-26.7	1.0	3.3
Travel Price Index (1982 - 84 = 100) (8)	Sept	144.5		-2.2	3.5	8.1
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Aug	38,989,948		-6.8	8.8	5.0
Overnight Stays	Aug	3,606,178		-3.0	5.4	5.3
Foreign Arrivals to the U.S.						
From Overseas(12)	May	1,399,096		24.5	14.4	1.5
From Canada(13)	Aug	2,840,063		9.5	16.2	11.2
From Mexico(12)	May	111,465		17.9	26.2	2.5
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Aug	2,259,462		8.9	2.4	-0.8
Domestic Demand for Gasoline						
Barrels/Day(14)	Aug	7,452	thousands	-1.4	-4.4	-1.5

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary, revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

US Travel Data Center

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November 1991 Volume 20, Number 11

U.S. Travelers Continue Summer Vacation Travel in 1991

Seventy-seven percent of all U.S. resident adults took at least one trip of 100 miles or more away from home in the last 12 months. Of these travelers, 63 percent or 90 million people, took at least one summer vacation trip in 1991, according to the U.S. Travel Data Center's National Travel Survey (NTS).

Thirty-four percent of all U.S. adult travelers, those who took at least 1 trip of 100 miles or more in the last 12 months, took only one summer vacation trip, 24 percent indicated taking between two and four, and 5 percent took five or more trips.

The Data Center's monthly survey interviews a national probability sample of 1,500 U.S. adults.

"A substantial number of travelers who did not take a summer vacation trip in 1991 were 50 years or older and retired," said Suzanne Cook, executive director of the U.S. Travel Data Center. "Traditionally, these travelers are more inclined to take their vacation trips in the off-season periods to avoid the congestion usually associated with the summer season."

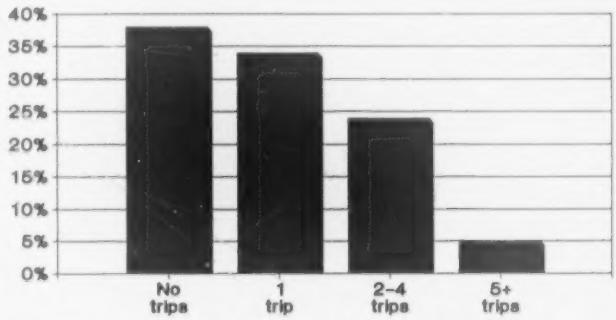
U.S. adult travelers enjoyed a variety of travel services during their summer vacation trip. Fifty-one percent stayed in a hotel or motel, 26 percent visited attractions and theme parks and 32 percent visited national or state parks.

Adults in single households were more likely to use airline services, trains, rental cars and travel agents during a summer vacation trip in 1991, compared to other types of households.

Theme parks and attractions were more popular among households with children, compared to single and married couple households without children. In addition, married couples were more likely to stay in hotels or motels.

Residents of some regions seemed to prefer some travel services over others, according to the NTS. Mid-Atlantic residents used airlines and rental cars more than any other region, East-South Central residents used hotels and motels more often, West-South Central residents were more inclined to visit attractions and theme parks and West-North Central residents were more likely to visit state and national parks.

Number of Summer Vacation Trips (U.S. Adult Travelers)



Source: U.S. Travel Data Center

The U.S. Travel Data Center sponsors and conducts the National Travel Survey (NTS), a monthly telephone survey with a national probability sample of 1,500 U.S. adults, which measures traveler volume and behavior, is available for use by travel suppliers and other companies.

The NTS was developed in 1979 in response to a demand for reliable, comprehensive indicators of U.S. travel activity.

With an annual sampling of 18,000, this is the longest running monthly telephone survey that continuously measures the trip characteristics and demographics of American travelers.

The Data Center is the nationally recognized organization that has the capability of focusing solely on the U.S. adult traveler market. This gives the Data Center the flexibility to ask a variety of questions that might be of interest to the travel industry.

For additional information contact Elizabeth Stewart, manager of market research at (202) 293-1040.

INSIDE:
- More Than 5.7 Million U.S. Travelers Go Overseas in 1990
- 1992 Travel Outlook Forum
- Frequent Business Travelers
- Travel Review Conference

Cost of Travel Increases Slightly in October

After decreasing in September, the cost of travel in the United States increased less than 1 percent in October. The cost of travel in October increased 0.4 percent over the previous month and increased 3.1 percent over the past 12 months, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 145.1 (1982 - 84 = 100) during October.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.2 percent in October and rose to 137.4.

Travel Price Index and Components

October 1991 TPI Component	Monthly % Change September 1991 to October 1991	Annual % Change October 1990 to October 1991
Transportation	-2.6	-11.3
Airline Fares	-3.8	-5.7
Other Intercity Trans.	0.9	3.4
Intracity Public Trans.	0.2	4.4
Motor Fuel	-1.5	-17.3
Lodging	2.3	13.8
Food and Beverages		
Away From Home	0.6	3.8
Entertainment	-0.1	6.0
TRAVEL PRICE INDEX	0.4	3.1
CONSUMER PRICE INDEX	0.2	2.9

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Even though the overall cost of travel increased in October, the transportation component of the TPI decreased more than 2 percent. Transportation costs also dropped more than 11 percent over the last 12 months.

Airline fares dropped nearly 4 percent in October and decreased nearly 6 percent over the last 12 months. Motor fuel costs decreased for the first time in 3 months, dropping 1.5 percent. In the last 12 months, motor fuel costs plummeted more than 17 percent.

Entertainment costs also showed a slight decrease in October, dropping less than 1 percent, but increasing 6 percent over the past 12 months.

Intracity public transportation, other intercity transportation and food and beverages away from home showed slight increases in October.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Vacation Travel Remains Stable in 1990

Vacation travel remained stable in 1990 after increasing 6 percent in 1989, according to the Data Center's *1990 National Travel Survey Full-Year Report.*

The duration of vacation travel continued to decline in 1990, as the average length of a vacation decreased from 4.7 nights in 1989 to 4.6 nights in 1990. The average round-trip distance of a vacation trip also declined in 1990, decreasing from 940 round-trip miles in 1989 to 880 round-trip miles in 1990.

Eighty percent of all vacationers in 1990 used the automobile as their primary mode of transportation, 15 percent used air, and 2 percent traveled by train. More than 43 percent of all vacationers visited friends and relatives in 1990, while 42 percent stayed in a hotel or motel.

Among the information contained in the 1990 Travel Market Report are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel by residents of the United States.

The statistics come from the Data Center's National Travel Survey, annually based on a telephone survey of 18,000 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040.

Proprietary custom questions may be added to the NTS and special tabulations of the data base are also available by contacting Elizabeth Stewart, manager of market research. *(Data Center members have been sent a complimentary copy.)*

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Frequent Business Travelers Decline in 1990

Frequent business travelers comprised the most influential segment of the 1990 business travel market, with only 14 percent of all business travelers taking more than half of all business trips in 1990, according to the Data Center's *1990 Survey of Business Travelers.*

The report, which is sponsored by the Official Airline Guides (OAG), said that even though the number of frequent business travelers declined in 1990, the number of trips they took rose from 73 million in 1989 to 79.6 million in 1990.

The number of "frequent" business travelers, those taking 10 or more business trips per year, dropped to 4.9 million frequent business travelers in 1990, compared to 5.2 million in 1989.

The average frequent business traveler took 16.1 business trips in 1990, nearly 12 more trips than the average business traveler.

Compared to less frequent business travelers, frequent travelers are much more likely to be male, married and 35-44 years old. The majority of this segment have higher education and occupation levels and higher household incomes than less frequent travelers.

A frequent business traveler's typical trip is more likely than a less frequent traveler to involve no overnight stay and less likely to last more than 3 nights. It is also significantly less likely to be combined with vacation. In addition, frequent business travelers are less likely to attend a meeting, convention or trade show.

A total of 35.1 million U.S. adults took one or more business trips in 1990, a more than 1 percent increase over 1989. At the same time, these travelers took 8.3 percent fewer business trips than in 1989, according to the report.

The Survey of Business Travelers has tracked the growth and characteristics of U.S. business travelers on a monthly and annual basis since 1986.

The SBT includes an overview of business travel, characteristics of business trips, a profile of business travelers, purpose of trips, modes of transportation and accommodations. Segments covered in the report include women business travelers, business car rentals, frequent travelers and airline travelers, among others.

The 1990 Survey of Business Travelers is available for $85 by contacting the Data Center at (202) 293-1040. *(Data Center members have been sent a complimentary copy.)*

Visitor Volume at National Parks

Region	September 1991 Visits	% Change from 1990*	Year to Date % Change*
NEW ENGLAND	1,548,518	-13.7%	-16.7%
MIDDLE ATLANTIC	2,749,606	-0.3	7.7
SOUTH ATLANTIC	7,491,381	0.4	-0.8
EAST SOUTH CENT.	1,740,082	4.2	5.0
EAST NORTH CENT.	643,523	3.4	9.7
WEST NORTH CENT.	1,028,635	5.3	8.2
WEST SOUTH CENT.	731,355	-2.5	-2.2
MOUNTAIN	5,244,467	8.9	2.8
PACIFIC	4,958,184	3.9	2.6
TOTAL	26,135,751	2.0	1.3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. **West North Central:** Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

Travel Review Conference Set for February 5, 1992

The 6th annual Travel Review Conference will be held on February 5, 1992 at the Holiday Inn Crowne Plaza in Arlington, Virginia.

The conference is sponsored by the U.S. Travel Data Center, Travel and Tourism Research Association (TTRA), the Washington Metropolitan Chapter of TTRA and the United States Travel and Tourism Administration (USTTA).

An uncertain economy, loss of consumer confidence, war, recession and a rapidly changing consumer marketplace dramatically reconfigured the travel industry in 1991.

The 1992 Travel Review Conference will provide timely analysis of the short and long term impacts of the Gulf War and recession on domestic and international travel across major industry sectors.

The program will include sessions on the war and [illegible] travel and ethnic travel. In addition, Suzanne Cook, executive director at the Data Center, will review domestic travel in 1990 and Harvey Shields, director, office of research at USTTA, will provide information on international tourism.

Registration before January 10 will cost $170 for TTRA/USTDC members, $190 for non-members and $100 for students. Registration after January 10 will cost $210 for everyone. The conference is limited to 400 attendees so early registration is strongly advised.

Please make checks payable to TRC '92 and mail to: TLC, Inc. - West, 8 Second Avenue SW, Ronan, MT 59864. For additional information, call the conference hotline at (406) 676-WEST.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Aug	$5,759	million	5.1	3.9	1.1
Eating and Drinking Places(2)	Oct	$15,918	million	1.0	4.9	3.9
Gasoline Service Stations(2)	Oct	$10,507	million	-1.1	-13.9	0.2
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Aug	62.5	percent	1.8	-1.0	-2.3
Real Demand for Commercial Lodging(4)	Aug	71.9	million	4.1	2.9	0.3
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Oct	27.4	billion	7.4	-2.4	-2.9
Int'l Revenue Passenger-Miles	Oct	10.3	billion	-6.1	9.3	-3.0
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Sept	45.4	billion	-13.6	1.9	0.6
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Oct	N/A				
Travel Price Index (1982 - 84 = 100) (8)	Oct	145.1		0.4	3.1	7.6
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Sept	26,135,751		-33.0	2.0	1.3
Overnight Stays	Sept	1,982,510		-45.0	-3.2	4.1
Foreign Arrivals to the U.S.						
From Overseas(12)	June	1,451,288		3.7	5.1	2.2
From Canada(13)	Sept	1,561,091		-45.0	0.7	10.0
From Mexico(12)	June	120,201		7.8	8.6	3.7
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Sept	1,171,367		-48.2	-7.2	-1.5
Domestic Demand for Gasoline						
Barrels/Day(14)	Sept	7,198	thousands	-4.7	4.1	-0.7

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary, revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary, Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

Research News for the U.S. Travel Industry

TRAVEL PRINTOUT

US Travel Data Center

December 1991 Volume 20, Number 12

Small Businesses Vital to Travel Industry's Growth

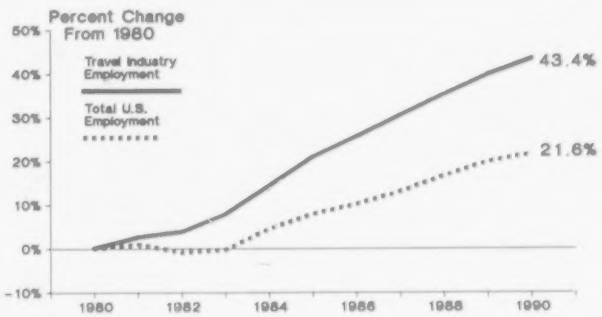
Travel industry employment has grown twice as fast as total U.S. employment, much of this growth can be attributed to the small business segment of the travel industry, according to the Data Center's *1990-91 Economic Review of Travel in America.*

Small businesses account for 99.8 percent of the nearly one-half million firms in the travel industry.

This major strength in the travel industry enabled the industry to remain the third largest U.S. retail industry in 1990. U.S. and foreign travelers spent $328 billion in the U.S. during 1990, up 6.5 percent from 1989. This equaled 6 percent of the gross national product (GNP), according to the report.

The industry also remained the second largest employer in 1990, directly supporting 5.9 million jobs. The employment generated by travel in the U.S. exceeds the populations of 80 countries.

TRAVEL INDUSTRY EMPLOYMENT HAS GROWN TWICE AS FAST AS TOTAL U.S. INDUSTRY EMPLOYMENT



Source: U.S. Travel Data Center

Small businesses are one of the major reasons for the travel industry's ability to endure economic downturns. "Small businesses are a stabilizing influence, slowing the rate of economic decline during business downturns and helping to stabilize declining regional economies," said Dr. Douglas Frechtling, economic consultant and author of the report. "But, when the economy begins to expand, small businesses are quick to hire and outpace large firms in producing new jobs over the long term."

Thirty-nine percent of all self-employed workers are in service enterprises, according to the Bureau of Labor Statistics. The most common type of self-employment is in non-hotel lodging; bed & breakfast inns, boarding houses, trailer parks and camps, and similar establishments.

In fact, recent surveys indicate the popularity of bed & breakfasts have been increasing in recent years. Overall occupancy at bed & breakfasts have increased 7 percent since 1986, according to *The 1990 Bed & Breakfast/Country Inn Industry Study.*

Small businesses provide ample opportunity for individuals to establish their own enterprises and offer distinctive services for the traveling public. Moreover, the small business environment tends to be strongly competitive, encouraging good service and fair pricing.

Other information in the *1990-91 Economic Review of Travel in America* includes:

- The 5.9 million jobs supported by the travel industry paid nearly $84 billion in wages and salaries, producing more than $43 billion in federal, state and local tax revenue.
- Including the "multiplier" effect, travel and tourism in America generated $226 billion in wages and salaries for 12.3 million jobs.
- Foreign visitors to the U.S. totaled 39 million in 1990, up 7 percent from the previous year. The expenditures from foreign visitors were more than $40 billion and generated 870 thousand jobs.
- U.S. travelers to foreign countries numbered nearly 44 million, up 4 percent and their spending increased 12 percent to $39 billion.

The 1990-91 Economic Review of Travel in America contains charts, tables, maps and narrative on consumer and industry trends, regional travel patterns, travel price inflation, travel and employment and international travel. The report is available for $60. For additional information or to order the report, contact the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Cost of Travel in U.S. Decreases in November

After increasing slightly in October, the cost of travel in the United States decreased 1.6 percent in November from the previous month, but increased 1.1 percent over the past 12 months, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. decreased to 142.8 (1982 - 84 = 100) during November.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.3 percent in November and rose to 137.8.

Travel Price Index and Components

November 1991 TPI Component	Monthly % Change October 1991 to November 1991	Annual % Change November 1990 to November 1991
Transportation	2.6	-10.6
Airline Fares	4.1	-5.2
Other Intercity Trans.	-0.2	2.9
Intracity Public Trans.	0.1	4.2
Motor Fuel	1.1	-16.5
Lodging	-5.4	8.2
Food and Beverages Away From Home	-1.1	2.4
Entertainment	0.5	6.0
TRAVEL PRICE INDEX	-1.6	1.1
CONSUMER PRICE INDEX	0.3	3.0

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Lodging prices continued to decline, decreasing 5.4 percent in November. It was the third consecutive month that lodging prices decreased.

The transportation component of the TPI increased more than 2 percent in November, but over the last 12 months transportation prices dropped more than 10 percent.

Airline fares increased more than 4 percent in November and decreased more than 5 percent over the last 12 months. After decreasing for the first time in 3 months in October, motor fuel costs increased slightly in November. In the last 12 months, motor fuel costs plummeted more than 16 percent.

Entertainment costs showed a slight increase in November. In the past 12 months, entertainment costs increased 6 percent.

The cost of other intercity transportation and food and beverages away from home showed slight decreases in November.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Travelers Prefer Hiking on Vacation Trips

Hiking was the most popular activity for travelers who took a vacation trip in the last 12 months, according to the U.S. Travel Data Center's National Travel Survey (NTS).

More than 20 percent of all travelers who took a vacation in the last 12 months said they participated in some type of hiking or backpacking on their most recent vacation trip. Camping and bicycling were the second and third most popular activity, cited by 18 percent and 16 percent, respectively of all vacationers.

Travelers were asked if they participated in 15 different activities during their most recent vacation trip. Some of the other popular activities included; horseback riding, mountain climbing, trail riding, scuba diving, snorkeling and sailing. Hang gliding, kayaking and wind surfing were some of the less popular activities.

The Data Center sponsors and conducts the NTS, a monthly telephone survey of national probability samples of 1,500 U.S. adults, which measures traveler volume and behavior.

The NTS has the capability of focusing solely on the U.S. adult traveler market, which gives the Data Center the flexibility to ask a variety of questions that might be of interest to the travel industry.

For additional information, contact Elizabeth Stewart, manager of market research at (202) 293-1040.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Board of Trustees Re-Elect Foster as Chairman

During its December 6 meeting in Washington, the U.S. Travel Data Center's Board of Trustees re-elected Jerry Foster, world-wide president of Travellers International in St. Louis, to serve a second term as chairman.

The other officers also received a vote of confidence as they will continue their positions in 1992: vice chairman, Edward R. Book, president of the Travel Industry Association of America; secretary, Dr. Charles R. Goeldner, professor of marketing at the University of Colorado; treasurer, C. Reath Edwards, director of corporate marketing at the Hershey Entertainment & Resort Company; executive committee member, Barbara Wickliffe, marketing research director at Best Western International.

Jorge Herrera, vice president sales & marketing of the Tourism Division at the Dallas Convention & Visitors Bureau and Barbara L. Klien, executive director at the Lake Tahoe Visitors Authority, are new trustees.

Also re-elected to serve another term as trustees were: Robert Gall, vice president, sales and advertising, Amtrak; Kenneth Hine, executive vice president at the American Hotel & Motel Association; Dr. John Hunt, department head at the University of Idaho; Robert Liming, director of international marketing, South Carolina Department of Parks, Recreation & Tourism; Peter Mason, travel category manager, Better Homes & Gardens; Patrick McMahon, director, Virginia Division of Tourism; Rossi Ralenkotter, director of marketing, Las Vegas Convention & Visitors Authority; Sally Susman, director of policy and industry affairs, American Express Travel Related Services; David Swierenga, assistant vice president of airline industry data, Air Transport Association; and Catherine Wheeler, director, Delaware Office of Tourism.

John Keller, under secretary for travel and tourism, U.S. Department of Commerce; and Dr. Barbara Everitt Bryant, director, Bureau of the Census, were re-elected as Ex Officio Advisors.

Visitor Volume at National Parks

Region	Oct. 1991 Visits	% Change Oct. 1990	Year to Date % Change 1991/90*
NEW ENGLAND	1,659,425	2.3%	1.0%
MIDDLE ATLANTIC	2,413,048	-2.8	6.6
SOUTH ATLANTIC	7,256,380	3.9	-0.6
EAST SOUTH CENT.	[illegible]	[illegible]	[illegible]
EAST NORTH CENT.	487,486	10.5	9.7
WEST NORTH CENT.	555,943	6.1	8.1
WEST SOUTH CENT.	790,375	8.1	-1.4
MOUNTAIN	3,457,155	20.6	4.0
PACIFIC	4,083,490	11.4	3.8
TOTAL	22,653,799	7.7	2.9

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England**: Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic**: N.J., N.Y., Penn. **S. Atlantic**: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. **East South Central**: Ala., Ky., Miss., Tenn. **East North Central**: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central**: Ark., La., Okla., Texas. **Mountain**: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific**: Alaska, Calif., Hawaii, Ore., Wash.

War, Recession, Taxes Highlight TRC '92

Travel executives from all major sectors of the industry will discuss the impact events of 1991 had on the travel industry at the 6th annual Travel Review Conference, to be held on February 5, 1992 at the Holiday Inn Crowne Plaza in Arlington, Virginia.

The conference is sponsored by the U.S. Travel Data Center, Travel and Tourism Research Association (TTRA), the Washington Metropolitan Chapter of TTRA and the United States Travel and Tourism Administration (USTTA).

This year's conference will provide in-depth analysis of the effect of the Gulf War, recession and increasing taxes on the traveler as well as discussions of travel trends and preferences in specialized market segments including the mature and ethnic travel markets.

In addition, Suzanne Cook, executive director at the Data Center, will review domestic travel in 1991 and Harvey Shields, director, office of research at USTTA, will provide a recap on international tourism. Other industry reviews will include business and incentive travel, transportation and accommodations.

The international and domestic travel sessions will be expanded this year and will include timely case studies, regional perspectives and travel industry responses to changing trends.

The Registration cost is $210, and since the conference is limited to 400 attendees early registration is strongly advised.

Please make checks payable to TRC '92 and mail to: TLC, Inc. - West, 8 Second Avenue SW, Ronan, MT 59864. For additional information, call the conference hotline at (406) 676-8593.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Sept	$5,278	million	-8.4	2.4	1.1
	Oct	$5,774	million	9.4	3.1	1.1
	Nov	$4,847	million	-16.1	3.4	1.2
Eating and Drinking Places(2)	Nov	$15,764	million	0.5	3.1	3.5
Gasoline Service Stations(2)	Nov	$10,562	million	1.1	-13.9	-1.3
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Sept	61.8	percent	-1.1	-3.0	-2.2
	Oct	62.2	percent	0.6	-1.6	-1.9
	Nov	62.1	percent	0.0	-0.5	-1.7
Real Demand for Commercial Lodging(4)	Sept	64.8	million	-9.9	2.1	0.4
	Oct	69.3	million	7.0	2.7	0.6
	Nov	59.4	million	-14.3	3.3	0.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Nov	24.8	billion	-9.3	-5.9	-3.1
Int'l Revenue Passenger-Miles	Nov	8.9	billion	-13.4	11.2	-1.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Oct	46.4	billion	2.1	3.2	0.9
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Oct	484.1	million	3.9	-0.5	2.9
	Nov	449.6	million	-7.1	-8.6	1.9
Travel Price Index (1982 - 84 = 100) (8)	Nov	142.8		-1.6	1.1	6.9
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Oct	22,653,799		-13.3	7.7	2.9
	Nov	13,993,812		-38.2	-2.7	2.4
Overnight Stays	Oct	1,182,410		-40.4	2.7	4.0
	Nov	612,041		-48.2	-9.7	3.5
Foreign Arrivals to the U.S.						
From Overseas(12)	July	1,857,858		28.0	16.4	4.9
	Aug	1,827,830		-1.6	11.5	6.0
From Canada(13)	Oct	1,435,010		-8.1	6.8	9.8
From Mexico(12)	July	197,959		64.7	22.8	7.9
	Aug	174,940		-11.6	11.6	8.6
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Oct	823,211		-29.7	-1.0	-1.5
Domestic Demand for Gasoline						
Barrels/Day(14)	Oct	7.273	thousands	2.6	0.6	-0.7
	Nov	7.028	thousands	-3.4	-2.9	-0.9

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary; Source: U.S. Department of Energy

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TRAVEL PRINTOUT

US Travel Data Center

January 1992 Volume 21, Number 1

Events of 1991 Impact Domestic Travel

"The Gulf War and recession of 1991 sent the travel industry into depths not seen since the early 1980s," said Suzanne Cook, executive director of the Data Center, during the 1991 Review of Domestic Travel at the 6th annual Travel Review Conference.

The conference, which was sponsored by the U.S. Travel Data Center (USTDC), the United States Travel and Tourism Administration (USTTA), Travel and Tourism Research Association (TTRA) and the Washington Metropolitan Chapter of TTRA, was held on February 5 at the Holiday Inn Crowne Plaza in Arlington, Virginia.

Preliminary results show that the overall volume of U.S. resident travel remained stable in 1991, increasing less than 1 percent over 1990. There were a total of 1.29 billion person-trips in 1991.
(A person-trip is one person traveling 100 miles or more away from home.)

"Business travel suffered a decrease of more than 8 percent in 1991, as corporations consolidated their trips in order to cut expenses," explained Cook to the nearly 300 delegates. Vacation travel, however, showed a slight increase over 1990.

The travel industry seemed to have suffered more from the long-term impact of the recession than from the short-term hit of the Gulf War. In fact, safety seemed to be of little concern to American travelers after the conclusion of the war. In a Data Center study, travelers rated domestic travel a 4.2, on a scale of one being not at all safe and 5 being very safe.

There were very few sectors of the travel industry that were immune to the events of 1991. The airline industry lost three carriers that were synonymous with air travel; Eastern, Midway and Pan American World Airways. The airline industry finished 1991 with an estimated loss of $2 billion, and this year's industry-wide profit will be in the range of $750 billion, assuming there is an economic recovery.

The recession and war, combined with an oversupply of rooms, had the hotel industry scrambling to cut costs and improve efficiency while waiting for the market to rebound. In 1991, the lodging industry showed the lowest occupancy rates since 1983.

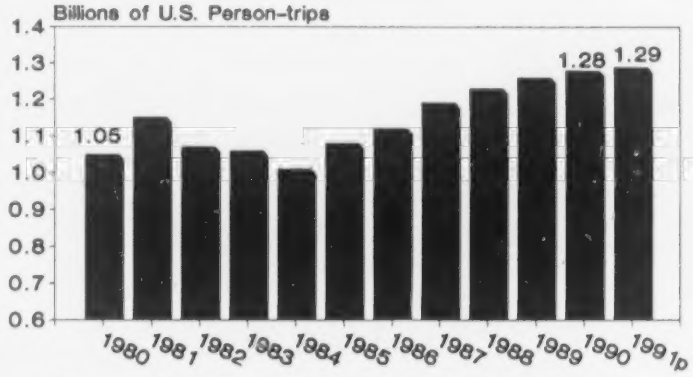
Americans visited national parks more than ever before in 1991. According to preliminary National Park Service figures, there were a total of 266 million recreation visits in 1991, an increase of nearly 3 percent over 1990.

The 1991 domestic review of travel includes year-end statistics for a number of travel industry sectors, as well as discussion of some promotional and marketing programs developed to combat the decline in travel.

Data Center members will be receiving a complimentary copy of the 1991 Domestic Review of Travel. In addition, members may purchase Suzanne Cook's slide presentation for $150, others may purchase the presentation for $275.

Proceedings from the conference will be available in late February. To order the proceedings, contact TTRA at (801) 581-3351. *(All conference attendees will be receiving a complimentary copy.)*

TRAVEL'S GROWTH STAGNANT IN 1991



Source: U.S. Travel Data Center's National Travel Survey

INSIDE:
- European Outbound Travel Declines 3 Percent
- Winter 1990-91 Travel Market Report Released

Cost of Travel in U.S. Increases in December

After decreasing slightly in November, the cost of travel in the United States increased 0.8 percent in December from the previous month, but increased 1.3 percent over the past 12 months, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 144.0 (1982 - 84 = 100) during December.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.1 percent in December and rose to 137.9.

Travel Price Index and Components

December 1991 TPI Component	Monthly % Change November 1991 to December 1991	Annual % Change December 1990 to December 1991
Transportation	1.1	-10.6
Airline Fares	3.0	-6.1
Other Intercity Trans.	0.7	2.4
Intracity Public Trans.	-0.1	3.8
Motor Fuel	-1.0	-16.0
Lodging	1.0	8.5
Food and Beverages Away From Home	0.9	3.1
Entertainment	-1.4	4.8
TRAVEL PRICE INDEX	0.8	1.3
CONSUMER PRICE INDEX	0.1	3.1

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Lodging prices increased 1 percent in December, after decreasing for three consecutive months. Over the last 12 months, lodging prices increased more than 8 percent.

While the transportation component of the TPI increased more than 1 percent in December, over the last 12 months transportation prices actually dropped more than 10 percent.

Airline fares increased 3 percent in December and decreased more than 6 percent over the last 12 months. Motor fuel prices decreased in December, after increasing in November. In the last 12 months, motor fuel costs plummeted 16 percent.

For the second consecutive month, entertainment costs showed a decrease, dropping 1.4 percent in December. In the past 12 months, entertainment costs increased nearly 5 percent.

The cost of other intercity transportation and food and beverages away from home showed slight increases in November, after showing decreases in November. In addition, both showed slight increases in the last 12 months.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Travel Review Conference Slides Available

How did the travel industry fare in 1991 despite the Gulf War and recession? How did vacation and business travelers adapt to the economy?

The answers to these, and other questions, are available from Suzanne Cook's speech on the 1991 review of domestic travel, which was presented to the 1991 Travel Review Conference in Washington on February 5. Data Center members can purchase Suzanne Cook's script and slide presentation for $150, others may purchase the presentation for $275.

The review of domestic travel speech discusses the volume of travel in 1990, trends, business and vacation travel, the impact of the Gulf War and recession, and 1991 reviews of other sectors of the travel industry.

The 6th annual Travel Review Conference was sponsored by the U.S. Travel Data Center, Travel and Tourism Research Association (TTRA), the Washington Metropolitan Chapter of TTRA and the United States Travel and Tourism Administration (USTTA).

The scripts and slides from Suzanne Cook's presentation on the 1991 review of domestic travel can be purchased by contacting the Data Center at (202) 293-1040.

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Gulf War, Recession Impact Winter Travel 1990-91

There were 240 million person-trips recorded during the months of December 1990 and January and February 1991, a decrease of more than 8 percent over the previous winter, according to the Data Center's *Winter 1990-91 Travel Market Report.*

"The events of the Persian Gulf War and the recession affected a variety of consumer behaviors, including the desire and ability travel," said Elizabeth Stewart, manager of market research at the Data Center.

Business and air travel appeared to have been the hardest hit sectors, each posting greater than average declines. Travel party sizes for business and air travel, however, increased as people looked for ways to consolidate their trips to offset the recession.

Of all person-trips taken last winter, nearly 75 percent were taken for pleasure purposes. Forty-seven percent of all person-trips were taken to visit friends and relatives, 15 percent for entertainment and 11 percent for outdoor recreation, according to the report.

Auto/truck/RV was again the most popular mode of transportation in winter 1990-91, accounting for 81 percent of all person-trips. Eighteen percent of all person-trips were through the air.

On average, travelers spent 4 nights away from home on winter 1990-91 person-trips. Pleasure person-trips lasted an average of 4.3 nights. While, business travelers spent an average of 3.1 nights away from home.

The Southeast region attracted the most travelers this past winter, as 75.8 million person-trips were recorded. The West region showed the largest decrease in visitors for the season, while the Northeast region was the only region to show an increase in visitors from a year ago.

The 1990-91 Winter Travel Market Report is one of four seasonal reports based on the Data Center's National Travel Survey (NTS). The report includes information on air and auto travelers, vacationers, business travelers and senior travel, among other segments.

The Winter report and the other seasonal reports can be purchased for $100 a piece. For additional information or to order the report, contact the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Visitor Volume at National Parks

Region	Nov. 1991 Visits	% Change Nov. 1990	Year to Date % Change 1991/90*
NEW ENGLAND	612,355	-0.2%	16.0%
MIDDLE ATLANTIC	1,592,262	3.0	6.4
SOUTH ATLANTIC	4,938,886	-6.8	-1.0
EAST SOUTH CENT.	1,232,939	-0.3	5.7
EAST NORTH CENT.	211,698	-16.2	8.7
WEST NORTH CENT.	282,897	-15.0	7.4
WEST SOUTH CENT.	472,538	-19.0	-2.5
MOUNTAIN	1,564,544	-10.5	3.4
PACIFIC	3,085,693	9.3	4.2
TOTAL	13,993,812	-3.0	3.4

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

Bill Evans Named Manager of Economic Studies

The U.S. Travel Data Center has named William R. Evans at its Manager of Economic Studies. Evans worked previously at the U.S. Travel Data Center from 1980-84 in this position before joining Laventhol & Horwath.

Prior to his return, Evans worked as a survey consultant at the Hay Group in Philadelphia. Evans will oversee the Data Center's annual *Economic Review of Travel in America* and will head the Travel Economic Impact Model (TEIM).

The Data Center's TEIM, which was revised last year, is the only national model which produces estimates of the economic impact of travel at the national, state and local levels. The model provides states, cities and regions with reliable estimates of economic impact and enables federal, state and local government officials and legislators to make intelligent policy decisions concerning the travel and tourism industry.

USTDC's Guest Column Debuts Next Month

February's Travel Printout will introduce a Guest Column, scheduled to appear every other month in the *Data Center Insider.* The new column will feature the latest in travel trends, research and other information from travel executives in all sectors of the industry.

Data Center members and Travel Printout subscribers are encouraged to participate in the Guest Column. If you would like submit an idea for a guest column piece, contact Scott Dring at (202) 293-1040.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Dec	$3,800	million	-21.6	1.9	1.2
Eating and Drinking Places(2)	Dec	$16,231	million	1.5	7.0	4.1
Gasoline Service Stations(2)	Dec	$10,303	million	-2.4	-13.3	-2.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Dec	60.9	percent	-1.9	2.7	-1.5
Real Demand for Commercial Lodging(4)	Dec	48.8	million	-17.8	2.1	0.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Dec	27.8	billion	11.9	3.5	-2.6
Int'l Revenue Passenger-Miles	Dec	9.3	billion	3.9	3.8	-1.5
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Nov	42.4	billion	-8.7	-0.2	0.8
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Dec	526.5	million	7.0	3.4	2.0
Travel Price Index (1982 - 84 = 100) (8)	Dec	144.0		0.8	1.3	6.5
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Dec	N/A				
Overnight Stays	Dec	N/A				
Foreign Arrivals to the U.S.						
From Overseas(12)	Sept	1,572,013		-14.0	15.3	7.2
From Canada(13)	Nov	1,296,341		-9.7	6.6	9.5
From Mexico(12)	Sept	110,214		-37.0	9.3	8.7
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Nov	530,612		-35.5	-9.0	-1.9
Domestic Demand for Gasoline						
Barrels/Day(14)	Dec	N/A				

(1) Source: Smith Travel Research; seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research; seasonally adjusted. 1986 and 1987 data have been revised. (4) Smith Travel Research; unadjusted room nights sold. (5) Preliminary; U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration; seasonal data reflect 1/94 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

February 1992 Volume 21, Number 2

States Struggle to Maintain Travel Budgets

State travel offices are struggling to maintain their funding at a time when budget cutters are looking everywhere for reductions. Twenty-one states plan to cut back on their state travel office budgets in 1991-92, according to the U.S. Travel Data Center's *1991-92 Survey of State Travel Offices*.

State governments plan to spend more than $342 million for travel and tourism development and promotion in fiscal year 1991-92, remaining stable from 1990-91. This is the first time in the past 10 years that total state tourism spending does not show an increase from the previous year.

The importance of the travel industry to the U.S. economy is reflected in the dramatic increase in state travel office budgets in the last 10 years. In 1980, the total of all 50 state travel office budgets reached $90 million. Now, at more than $342 million, this is nearly a 280 percent increase.

In recessionary times state budgets are cut back, but tourism budgets seem to be able to weather the storm. During the last recession in 1981-82, state travel office budgets managed to show an increase of 2 percent.

The 19th annual report, which provides state travel office budgets by category as well as information on advertising, promotion, research and other programs, listed Texas as having the highest projected state travel office budget in fiscal year 1991-92. Texas increased its state travel office budget 31 percent in 1991-92, to more than $26.7 million.

Even though there are 21 states experiencing budget cuts this year, only three (Hawaii, Pennsylvania and Alaska) of the top 10 state travel office budgets have been reduced. The top five projected state travel office budgets for 1991-92 include; Texas, Illinois, Hawaii, Louisiana and Florida. The average state travel office budget is $6.8 million for the fiscal year 1991-92.

Louisiana's state travel office budget continued to climb in 1991-92. After increasing its state travel budget 81 percent last year, Louisiana received an additional 44 percent increase in 1991-92. In addition, Massachusetts, New Mexico, North Dakota and Texas project significant increases for fiscal year 1991-92. States such as California, New York and Tennessee, however, project significant decreases in their budgets.

Top 10 List

1.	Texas	$26.7 million*
2.	Illinois	25.0
3.	Hawaii	23.0
4.	Louisiana	13.5
5.	Florida	12.8
6.	Pennsylvania	12.4
7.	Alaska	10.5
8.	South Carolina	10.3
9.	Virginia	9.9
10.	Colorado	9.7

* Projected numbers for 1991-92

A large component of each state's travel office budget is the amount allocated for advertising purposes. For the second straight year, Illinois intends to spend the most on advertising, with a budget of $10 million this year. Louisiana, Texas, Virginia and Hawaii round out the top five state advertisers.

With 47 of the 50 states reporting, the average advertising budget for 1991-92 is more than $2.35 million, representing a significant increase over the 1980 average of $643,500 per state. The average advertising budget decreased 3.7 percent over last year.

More than half of all the states reporting showed declines in their advertising budgets. In addition, the top 10 state advertising budgets accounted for nearly 50 percent of the total for fiscal year 1991-92.

The 1991-92 Survey of State Travel Offices is based upon questionnaires completed by representatives of all the state travel offices, the District of Columbia and U.S. territories.

In addition to detailed budget breakdowns, the survey also provides information about state governments' programs including: General Administration, Organization, Advertising and Promotion, Press and Public Relations, Research and Welcome Centers.

The 1991-92 Survey of State Travel Offices is available for $75 and can be purchased by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Travel Prices Increase 2 Percent in January

The cost of travel in the United States increased for the second consecutive month, increasing 2 percent in January and increasing less than 1 percent over the past 12 months, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 146.9 (1982 - 84 = 100) during January.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.2 percent in January and rose to 138.1.

Travel Price Index and Components

January 1992 TPI Component	Monthly % Change December 1991 to January 1992	Annual % Change January 1991 to January 1992
Transportation	-1.6	-9.1
Airline Fares	0.4	-6.3
Other Intercity Trans.	-0.4	1.5
Intracity Public Trans.	3.6	7.0
Motor Fuel	-4.0	-12.7
Lodging	7.4	5.3
Food and Beverages Away From Home	0.1	3.0
Entertainment	0.2	4.3
TRAVEL PRICE INDEX	2.0	0.9
CONSUMER PRICE INDEX	0.2	2.6

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Lodging prices increased for the second straight month, increasing more than 7 percent in January. Over the last 12 months, lodging prices increased more than 5 percent.

The transportation component of the TPI decreased for the first time since October, decreasing nearly 2 percent in January. Over the last 12 months transportation prices actually dropped more than 9 percent.

Airline fares showed a slight increase in January and decreased more than 6 percent over the last 12 months. Motor fuel prices dropped 4 percent in January. In the last 12 months, motor fuel costs plummeted nearly 13 percent.

Entertainment costs showed a slight increase this past January, after decreasing in November and December. In the past 12 months, entertainment costs increased more than 4 percent.

The cost of other intercity transportation and food and beverages away from home remained fairly stable in January. In addition, both showed slight increases in the last 12 months.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Fifty-six million U.S. Adults Intend to Travel Internationally in 1992

Nearly 56 million people or 30 percent of the U.S. adult population indicated they are likely to take an international trip in 1992, according to the U.S. Travel Data Center's National Travel Survey (NTS).

The survey, which interviewed 1,500 U.S. adult residents in December 1991, indicated that 63 percent of all U.S. adults who have taken an international trip in the past three years are very or somewhat likely to take another international trip in 1992. These potential international travelers are more likely to be between 45 to 49 years old, with an annual family income of $40,000 or more and employed in professional or managerial positions.

The U.S. Travel Data Center sponsors and conducts the NTS, a monthly telephone survey with probability samples of 1,500 U.S. adult residents, which measures traveler volume and behavior and which is available for use by travel suppliers and other companies. The Data Center has the capabilities of focusing solely on the U.S. adult traveler market. This gives the Data Center the flexibility to ask a variety of custom proprietary questions to meet clients' particular information needs.

Call Susan Weil of the Data Center at (202) 293-1040, to find out how you can add questions to the National Travel Survey.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America, Two Lafayette Centre, 1133 21st Street, NW, Washington, D.C., 20036. (202) 293-1040.

Dr. Suzanne D. Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

Travel Declines 1.2 Percent in Second Quarter 1991

Travel decreased 1.2 percent in the second quarter of 1991 compared to the same period in 1990, this after remaining stable in the first quarter, according to preliminary numbers from the U.S. Travel Data Center's National Travel Survey (NTS).

Both business and vacation travel, in terms of person-trips, showed declines over the period of April, May and June while personal travel increased significantly. Personal travel encompasses trips taken for weddings, relocation and funerals, among others.

Vacation travel remained stable while weekend trips increased significantly, continuing the trend of consumer's shorter duration travel during economic downturns. The average party size for travel grew to 2.1 people for the second quarter, compared to 1.9 people during the same period in 1990.

Hotel travel increased more than 1 percent during this period compared to 1990, but the increase in the supply of rooms resulted in a drop in occupancy rates. Auto travel remained flat despite declining gasoline prices. Air travel also remained stable due largely to a strengthening domestic market.

The National Travel Survey is conducted monthly by telephone and with national probability samples of 1,500 adults. For additional information on the survey, contact Elizabeth Stewart, manager of market research, at (202) 293-1040.

Visitor Volume at National Parks

Region	Dec. 1991 Visits	% Change Dec. 1990	Year to Date % Change 1991/90*
NEW ENGLAND	306,261	-9.9%	1.1%
MIDDLE ATLANTIC	1,225,055	5.2	6.8
SOUTH ATLANTIC	3,860,500	0.5	-0.9
EAST SOUTH CENT.	963,760	12.0	6.0
EAST NORTH CENT.	189,180	5.1	8.6
WEST NORTH CENT.	246,394	31.8	7.8
WEST SOUTH CENT.	376,569	2.6	-2.3
MOUNTAIN	1,157,035	-0.4	3.5
PACIFIC	2,584,145	14.5	4.7
TOTAL	10,908,899	5.3	2.8

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

Discoveries...

Frequent leisure travelers take an average of 6 trips per year and spend an average of $3,820 on each of these trips, according to Erdos & Morgan/MPG's *Frequent Leisure Travelers; A Study of Markets and Media.*

The typical frequent leisure traveler, defined as those who earn $35,000 or more a year and have taken five or more leisure trips in the past three years, is male (66.9 percent) and has an average household income of $62,740.

Almost three-quarters of frequent leisure travelers plan their own itinerary rather than take organized tours, but the popularity of organized tours does increase with age. More than 55 percent of all frequent leisure travelers collect information about trips themselves, while 32 percent use travel agents.

The average length of leisure trips for these travelers is nearly 9 days. The preferred trip length is strongly related to the age of the traveler, with older travelers preferring longer trips.

The report also includes information on selected media that reach frequent leisure travelers. The top 3 publications that reach this market include; Reader's Digest, National Geographic and USA Today.

Frequent Leisure Travelers is a market investigation designed to provide current insights into the character, attitudes and needs of the affluent leisure traveler. It is based on 5,105 completed interviews among those with household incomes of $35,000 or more who have taken five or more leisure trips in the past three years. The information represents the activities of nearly 25 million leisure travelers.

Erdos & Morgan/MPG, a marketing research firm, also publishes *Frequent Business Travelers; A Study of Markets and Media.* For additional information on both reports, call Irene Ochs-Lilien at (212) 685-9393.

"Discoveries" is a Travel Printout feature designed to give added exposure to all types of travel-related research. To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Current Travel Indicators - 1990/91/92

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Dec	$3,800	million	-21.6	1.9	1.2
Eating and Drinking Places(2)	Jan	$16,689	million	0.7	8.8	8.8
Gasoline Service Stations(2)	Jan	$10,639	million	1.4	-5.9	-5.9
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Dec	60.9	percent	-1.9	2.7	-1.5
Real Demand for Commercial Lodging(4)	Dec	48.8	million	-17.8	2.1	0.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Jan	24.2	billion	-12.9	-3.1	-3.1
Int'l Revenue Passenger-Miles	Jan	9.4	billion	1.4	15.2	15.2
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Dec	43.4	billion	2.4	7.6	1.3
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Dec	526.5	million	7.0	3.4	2.0
Travel Price Index (1982 - 84 = 100) (8)	Jan	146.9		2.0	1.0	1.0
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Dec	10,908,899		-22.0	7.3	4.5
Overnight Stays	Dec	363,536		-40.6	4.6	3.5
Foreign Arrivals to the U.S.						
From Overseas(12)	Oct	1,332,922		-15.2	5.2	7.0
From Canada(13)	Dec	1,185,246		-8.5	14.9	9.8
From Mexico(12)	Oct	111,262		0.9	0.0	7.8
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Dec	547,130		3.1	0.0	-1.8
Domestic Demand for Gasoline						
Barrels/Day(14)	Dec	N/A				

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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TRAVEL PRINTOUT

US Travel Data Center

March 1992 **Volume 21, Number 3**

Travel Industry Adapts to Recession, Changing Travel Patterns

As signs of an economic recovery begin to appear, the travel industry will start to examine the effects of the recession and the impact it had on the industry. The good news is that travelers continued to travel during the recession, albeit differently, and the travel industry adapted to the economy through innovative marketing strategies that will continue to be seen in future years.

Shorter trips, traveling closer to home, using automobiles and taking more weekend trips are trends that have been identified throughout the travel industry since the start of the recession.

Many industry analysts believe that travelers, more than ever before, took these trips because of economic restraints on their travel budgets. In fact, preliminary numbers from the U.S. Travel Data Center indicate that weekend travel increased more than 9 percent in 1991. In addition, the Data Center estimates that records were set this past summer in the percentage share of automobile travel and shorter trips.

Most of these trends are not new to the industry and are unlikely to disappear when the economic downturn ends. "Many of these current trends were first seen several years ago," said Suzanne Cook, executive director of the U.S. Travel Data Center. "These trends are just more prevalent because of the recession."

One of the most wide-spread trends in the travel industry during the last few years has been the growth in shorter duration and weekend travel.

In the mid to late 1980s, statistics showing the increasing popularity of weekend travel attracted the attention of the travel industry. The distinct upward trend in the number of weekend trips was first seen in 1984. Since then, weekend travel has increased more than 30 percent and is considered to be one of the fastest growing segments in the industry.

> ***"The industry showed great adaptability and resourcefulness in meeting the consumer's needs during the recession."***
>
> ***Suzanne Cook***

What will happen to this trend in the coming years? "The decrease in Americans' leisure time, increase in the number of dual-career couples, growing stress and other social and demographic factors have all contributed to the growth in weekend travel," explained Elizabeth Stewart, manager of market research and editor of the Data Center's *Weekend Travel: America's Growing Trend.* "There is no reason to think that these factors will not continue to increase weekend travel after the recession is over."

According to a *Better Homes and Gardens Family Vacation Survey*, conducted by the Data Center last summer, approximately 58 percent of all family vacations were weekend trips.

In 1991, family vacation travelers were more value and price conscious than at any time in recent years. In fact, 40 percent of all family vacation travelers spent less than $500 on their trip in 1991, according to the BH&G survey. Some of the more popular family vacations in 1991 included visiting friends and relatives and visiting such cost-efficient attractions as national parks, oceans and beaches, lakes and historical sites.

In an attempt to adapt to these changing traveler characteristics, the travel industry embarked on innovative marketing strategies and techniques geared toward more economical travel. "The industry showed great adaptability and resourcefulness in meeting the consumer's travel needs during the recession," said Cook.

The hotel industry developed several pro-active marketing efforts that offered consumers a variety of incentives in their attempt to fill rooms.

(Continued on page 3.)

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- Publication Guide
- 1991-92 Survey of State Travel Offices

Cost of Travel in U.S. Increases in February

The cost of travel in the United States increased for the third consecutive month, increasing less than 1 percent in February, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 148.1 (1982 - 84 = 100) during February.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), also increased less than 1 percent in February and rose to 138.6.

Lodging prices increased for the third straight month, jumping 3 percent in February. Over the last 12 months, lodging prices increased more than 6 percent.

The transportation component of the TPI decreased for the second consecutive month, dropping more than 1 percent in February. Over the last 12 months transportation prices dropped an additional 7 percent.

Airline fares decreased less than 1 percent in February and decreased nearly 8 percent over the last 12 months. Motor fuel prices also decreased in February, dropping nearly 2 percent.

Entertainment costs showed a slight increase in February, increasing nearly 1 percent. In the past 12 months, entertainment costs increased nearly 5 percent.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Travel Price Index and Components

February 1992 TPI Component	Monthly % Change January 1992 to February 1992	Annual % Change February 1991 to February 1992
Transportation	-1.2	-7.0
Airline Fares	-0.8	-7.6
Other Intercity Trans.	0.3	1.8
Intracity Public Trans.	0.1	6.4
Motor Fuel	-1.7	-6.8
Lodging	3.1	6.1
Food and Beverages Away From Home	0.2	2.7
Entertainment	0.7	4.9
TRAVEL PRICE INDEX	0.8	1.7
CONSUMER PRICE INDEX	0.4	2.8

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Top Ten State Travel Budgets Sustain Growth

Even though 21 states experienced state travel office budget cuts this year, seven of the top 10 budgets showed percentage increases from the previous year, according to the U.S. Travel Data Center's *1991-92 Survey of State Travel Offices.*

The top 10 state travel office budgets showed an average increase of nearly 11 percent, with only Hawaii, Pennsylvania and Alaska showing decreases. Louisiana and Texas are enjoying substantial increases in their budgets this year with increases of 44 percent and 31 percent, respectively.

Overall, state governments plan to spend more than $342 million for travel and tourism development and promotion in fiscal year 1991-92, an amount about equal to last year.

The 1991-92 Survey of State Travel Offices is based upon questionnaires completed by representatives of all the state travel offices, as well as similar offices in the District of Columbia and U.S. territories.

In addition to detailed budget breakdowns, the report also provides information about state governments' programs including: General Administration, Organization, Advertising and Promotion, Research and Welcome Centers.

This publication is available for $75 and can be purchased by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

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Dr. Suzanne Cook, Executive Director
Scott M. Dring, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; Foreign countries, $80 per year. ISSN: 0744-6233.

(Continued from page 1.)

Non-refundable advance purchase discounts, reduced rate programs, weekend discounts and free weekend nights were some of the many discount programs hotels used to boost consumer demand.

One of the most publicized national campaigns was the GO USA Coalition, in which the travel industry joined forces in a massive public awareness campaign designed to shake travelers out of their wait and see attitude.

There were other alliances that were formed to offset the negative effects of the recessionary economy. Travel agents and car rental companies sought new levels of cooperation. As consumers flocked to travel agents for help in sorting out the confusing array of travel options, many car rental companies accelerated their marketing to retailers by stepping up their travel agent-oriented promotions and offering discounts, free upgrades and other incentives to be passed along to clients.

Meetings, Attendees Down in 1991, IACVB Report Says

The number of meetings and conventions held in the United States last year declined significantly, while the number of delegates recorded only a slight decrease, according to a recent survey conducted by the International Association of Convention & Visitor Bureaus (IACVB).

According to the report, which surveyed IACVB's U.S. members, delegates to meetings were down more than 3 percent and meetings were down nearly 24 percent in 349 IACVB member U.S. cities. The meetings generated an estimated $56.6 billion in 1991 as compared to $54.6 billion in 1990.

Survey respondents are expecting the number of meetings to remain relatively flat in 1992, projecting a 2.2 percent decrease in the year ahead. Attendance, however, is projected to increase nearly 2 percent in 1992.

For additional information on the Delegate/Meeting Survey, contact S.A. Miller of the Communication Department at the International Association of Convention & Visitor Bureaus at (217) 359-8881.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name to: Travel Printout, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036 or call (202) 293-1040.

USTDC Releases "New Look" Publication Guide

The Data Center recently released a new publication guide that lists all of the Data Center publications. In addition, the guide describes reports from the United States Travel and Tourism Administration (USTTA) and the European Travel Intelligence Center, which the Data Center also promotes and sells.

Some of the USTTA reports include the *In-Flight Surveys*, the *Pleasure Travel Market to North America* Series and the *Summary and Analysis of Travel to the United States*, all of which may be purchased through the Data Center.

Also included in the Data Center's publication guide are the *Discover America 2000* publications, commissioned by the Travel Industry Association of America.

In addition to the publication listings, the publication guide contains an easy to use order form which can be faxed or mailed. If you would like a complete and free listing of domestic and international travel research reports available from the Data Center, call (202) 293-1040. *(Members have been mailed a copy of the publication guide.)*

NTTAC Readies for National Tourist Appreciation Day™

The National Travel and Tourism Awareness Council (NTTAC) has declared Wednesday, May 6, 1992 "National Tourist Appreciation Day™" and is sponsoring a nationwide tie-in campaign to recognize the millions of travelers who make tourism America's third-largest industry. National Tourist Appreciation Day will be observed during National Tourism Week, May 3-9, 1992.

Themed, "Thanks to You, Tourism Works for America," participating businesses will make their customers "Super Stars" for the day. Customers will be presented with a gold "super star" badge and a statistical facts card which can be imprinted with a discount/gift coupon on the reverse side.

The campaign also features posters, counter cards, table mats, tents as collateral materials. According to the council, more than 10 million people will be traveling in America on National Tourist Appreciation Day™.

"The campaign is cost-effective, easy to implement and a good way for individual travel and tourism industry companies to get involved," said John G. Keller, under secretary of commerce for travel and tourism at the U.S. Travel and Tourism Adminstration and the NTTAC's public sector co-chair.

For additional information on National Tourist Appreciation Day, contact Meg Cavendish at (202) 293-1433.

Current Travel Indicators - 1991/92

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	Dec	$3,800	million	-21.6	1.9	1.2
Eating and Drinking Places(2)	Feb	$16,288	million	0.1	4.2	5.1
Gasoline Service Stations(2)	Feb	$10,704	million	3.1	-1.7	-5.2
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	Dec	60.9	percent	-1.9	2.7	-1.5
Real Demand for Commercial Lodging(4)	Dec	48.8	million	-17.8	2.1	0.8
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	Feb	23.5	billion	-3.1	1.7	-0.8
Int'l Revenue Passenger-Miles	Feb	8.6	billion	-8.5	66.0	34.9
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	Jan	39.2	billion	-9.7	6.8	6.8
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	Jan	437.9	million	-6.4	-1.6	-1.0
Travel Price Index (1982 - 84 = 100) (8)	Feb	148.1		0.8	1.7	1.3
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	Jan	N/A				
Overnight Stays	Jan	N/A				
Foreign Arrivals to the U.S.						
From Overseas(12)	Nov	1,219,785		-8.5	8.9	7.1
From Canada(13)	Dec	1,185,246		-8.6	14.9	9.9
	Jan	1,209,123		2.0	14.1	14.1
From Mexico(12)	Nov	100,168		-9.8	2.1	7.3
U.S. Citizen Departures						
To Overseas(12)	Jan	N/A				
To Canada(13)	Dec	547,130		3.1	0.0	-1.8
	Jan	433,348		-20.8	13.6	13.6
Domestic Demand for Gasoline						
Barrels/Day(14)	Dec	7,221		3.1	3.5	-0.6
	Jan	6,915		-4.2	4.1	4.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary, U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting visits. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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Research News for the U.S. Travel Industry

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Research News for the U.S. Travel Industry
APRIL / MAY 1992
Volume 21, Number 4

Weekend Travel Soars In Summer Of Decline

As Americans plan for vacations this summer, industry experts hope that this summer will be much brighter than the summer of 1991. Although last summer's numbers showed an overall decrease in the amount of travel in the United States, there were also positive signs.

For the first time since 1986, the amount of summer travelers declined. Nearly 215 million trips were taken during last summer (June - August), down 3.5 percent from the previous year. On a person-trip basis, travel decreased nearly 3 percent, from 437.0 million person-trips during the summer of 1990 to 425.4 person-trips in 1991.

" The economy was the major factor influencing this decline," said Suzanne Cook, the Data Center's executive director.

Key economic factors during the summer of 1991 contributed to the decline in the person-trips. The Gross Domestic Product dipped 0.8 percent and payroll employment posted a 1.4 percent decline. The amount of real disposable income also declined, although slightly by 0.2 percent.

Economics also played a major role in the way in which travelers vacationed last summer. Weekend trips were the only segment of summer travel to increase. This segment of travel grew substantially, as nearly 245 million person-trips were recorded.

Transportation costs were another factor last summer. There was an increase in travelers using ground transportation rather than flying. In the summerof 1991, air person-trips fell almost five percent.

The most popular destination region during the summer of 1991 was the Southeast, receiving 109.5 million person-trips. Despite this number, the region experienced a decline by nearly five percent over the previous summer.

Weekend excursions were the only segment of summer travel to increase in the summer of 1991. The area of travel grew 14 percent. -- *USTDC 1991 Summer Travel Market Report*

In addition to overall person-trips, another trip category also suffered a decline. Business and convention travel declined nearly eight percent during the summer of 1991.

Last summer over 80 percent of travelers indicated they traveled for pleasure. Of the total 425.4 million person-trips, 33 percent were taken to visit family of friends, 31 percent went for entertainment and 17 percent traveled for outdoor recreational activities. Only 12 percent of all person-trips were taken for business reasons.

Last summer, travelers stayed closer to home, averaging person-trips of 820 miles (round trip). That number is down from the previous summer. Business and conventions trips were especially effect in this category, as round trip mileage dropped over 14 percent.From 990 in 1990 to 850 in 1991.

Demographically, many of the summer 1991 travelers were married (57%), male (54%), between the ages of 25-44 (46%) and had completed college (42%). The average traveler worked in a typical professional or managerial position (27%) and earned an annual family income of $40,000 or more (50%). The average age of the traveler in the summer of 1991 was 42 years old.

(Continued on page 3.)

INSIDE

- March Travel Price Index Report
- New Data Center Reseach Catalog
- European Travel

Cost Of Travel Increases For Fourth Consecutive Month

For the fourth consecutive month, the cost of travel increased in the United States. According to the Data Center's latest Travel Price Index (TPI), the 0.7 percent rise in March travel costs were mainly attributed to an increase in the cost of airfares.

Travel costs in the United States have only decreased twice in the last ten months. In November, travel expenses declined 1.6 percent, but increased in January by 2 percent. The TPI also decreased in September by 2.2 percent, the largest drop in 1991. Overall, the TPI rose 2 percent over the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 149.2 (1982-84 = 100) during March. The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

TRAVEL PRICE INDEX AND COMPONENTS

MARCH 1992	MONTHLY % CHANGE FEBRUARY 1992 TO MARCH 1992	ANNUAL % CHANGE MARCH 1992 TO MARCH 1991
TPI COMPONENTS		
TRANSPORTATION	1.7	-1.9
Airline fares	2.7	-2.7
Intracity Public Trans.	0.3	6.6
Other Intracity Trans.	0.4	4.3
Motor Fuel	0.5	-1.3
LODGING	0.9	3.3
FOOD AND BEVERAGES AWAY FROM HOME	0.2	2.7
ENTERTAINMENT	0.4	5.4
TRAVEL PRICE INDEX	0.7	2.0
CONS. PRICE INDEX	0.5	3.2

(SOURCE: U.S. TRAVEL DATA CENTER)

The U.S. Travel Data Center releases the Travel Price Index in the last week of each month. For more information on the TPI, contact Joseph P. Horak at (202) 293-1040.

Joseph P. Horak Named Public Relations Coordinator

Suzanne Cook, executive director, appointed Joseph Horak to fill the public relations coordinator position with the U.S. Travel Data Center.

Horak spent the last two years working in public relations with the Kansas City Comets and the Kansas City Royals. The University of Kansas graduate also coordinated public relations for the 1991 Major Soccer League All-Star Game.

"We are extremely pleased to have Mr. Horak join the Data Center," said Cook. "I believe his background and experience will be a benefit to our group and assist in our continuing efforts to keep the travel industry supplied with important market and economic information."

In addition to other duties, Horak will edit the *Travel Printout* newsletter. He is also responsible for co-organizing the Data Center's 11th Annual Summer Vacation Forecast news conference, which is held in conjunction with the American Automobile Association. The event, to be held in Washington, D.C. on May 19th, will unveil the Data Center's/AAA summer travel projections for Memorial Day and the remainder of the summer.

THE TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

THE TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; Foreign countries, $80. ISSN: 0744-6233

European Travel Fairs Better Than Expected In Unstable Travel Season

Nineteen ninety-one looked as if it would be a difficult year for the European travel and tourism industry. However, despite gloomy projections, the European Travel Intelligence Center (ETIC) announced that preliminary results of their European Travel Monitor (ETM) indicate that the downturn in travel was not as sharp as industry analysts had predicted.

There were three major factors that contributed to the decline in 1991 European travel: the negative impact of the Gulf War, the major economic recession and the political crisis in Yugoslavia, one of the area's top markets for tourism.

"Nevertheless," said Rolf Freitag, executive director of ETIC, "European outbound travel has clearly survived the political and economic crises. This reflects the importance of the industry and its enormous potential for the future.

"In addition," said Freitag, "it is also indicative of the increased professionalism of the European travel industry. When there is a crisis in one sector or destination, the trade is far quicker than it used to be in offering alternatives."

The overall trend does mask wide differences from one market to another. The ETIC results found that certain European markets profited from the misfortunes of other sectors.

Central Western Europe, comprising Germany, Austria and Switzerland, was the only region to register an increase in trip volume as an origin. This increase was primarily due to the influx of former East Germans, who were able to travel abroad.

In terms of destinations, the Mediterranean bordering countries lost further market share, due mainly to the unrest in Yugoslavia. On the other end of the spectrum, Scandinavia and Eastern Europe recorded a 19 percent increase in the volume of incoming travel.

Information contained in this article can be found in the *European Travel Monitor Update*. For more information on European travel and the European Travel Intellegence Center, contact Susan Weil at the U.S. Travel Data Center at (202) 293-1040.

Custom Research Catalog Now Available

The U.S. Travel Data Center has released a catalog describing several of the many research capabilities the Data Center offers the travel industry.

The free catalog, available to the public, gives detailed descriptions of Data Cener services which help travel businesses evaluate their product and market.

In addition to adding questions to or utilizing information collected through the National Travel Survey and measuring the impact of travel and tourism on the economy through the Data Center's Travel Economics Impact Model (TEIM), services include image studies, visitor profiles, advertising tracking studies, international data, focus groups, telephone surveys and the development of specialized research plans.

To order a copy of the catalog, call the U.S. Travel Data Center's marketing department at (202) 293-1040. (Data Center members will be mailed a copy of the catalog.)

Continued From Page 1

Later this month, the Data Center will release its outlook for the 1992 summer vacation season. In cooperation with the American Automobile Association, the Data Center will forecast the volume and reason for travel this summer. In addition, the outlook will also delve into the economic ramification of travel this summer.The AAA will discuss the travel forecast for the Memorial weekend holiday.

For more information on the Summer Vacation Forecast as well as other publications, contact the Data Center at (202) 293-1040.

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MARCH / YR. AGO	/ YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging (1)	FEB	$5,766	millions	17.3	7.6	7.2
	JAN	$4,915	millions	29.3	6.7	6.7
Eating and Drinking Places (2)	MAR	$16,519	millions	- .5	6.2	6.3
Gasoline Service Stations (2)	MAR	$10,208	millions	- .8	-5.6	-6.8
Consumer Lodging Demand						
Hotels/Motels Occupancy Rates (3)	FEB	61.7	percent	2.0	3.0	2.5
	JAN	60.5	percent	- .7	2.0	2.0
Real Demand For Commercial Lodging (4)	FEB	63.4	millions	21.3	6.3	6.2
	JAN	52.3	millions	7.0	6.0	6.0
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	MAR	27.5	billions	17.4	2.2	.3
Int'l Revenue Passenger Miles	MAR	10.1	billions	17.5	44.9	38.4
Highway Traffic Volume (6)						
Rural Arterial Vehicle Miles	FEB	38,186	millions	-2.8	5.8	6.3
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	FEB	437.9	millions	-6.4	-1.6	-1.0
Travel Price Index (8)						
(1982-1984 = 100)	MAR	149.2		.7	2.0	1.6
Visitor Vol. at National Park Service Areas (11)						
Recreational Visits	N/A					
Overnight Stays	N/A					
Foreign Arrivals to the United States						
From Overseas (12)	DEC	1,448,595		18.8	9.0	7.3
From Canada (13)	FEB	1,095,681		-9.4	10.4	12.3
From Mexico (12)	DEC	158,216		58.0	9.9	7.6
U.S. Citizen Departures						
To Overseas (12)	DEC (90)	1,262,000		18.0	3.6	8.0
To Canada (13)	FEB	497,854		14.9	6.1	9.5
Domestic Demand For Motor Gasoline (14)						
Barrels Per Day	FEB	6,851	thousands	- .6	.7	2.2

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted, 1986 and 1987 data has been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) U.S. Travel Data Center. (10) U.S. Travel Data Center, data is not comparable to earlier published numbers due to revised methodology. (11) National Parks Service, preliminary, unadjusted for differences in reporting units. (12) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (13) Statistics Canada. (14) U.S. Department of Energy, prelim.

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U.S. Travel Data Center

Research News for the U.S. Travel Industry

JUNE 1992 Volume 21, Number 5

Summer Vacation Trips To Increase 4 Percent

Following a summer of decline, the U.S. Travel Data Center is forecasting a rebound in summer vacation travel in 1992. The Data Center is expecting a 4 percent increase in the volume of summer vacation person trips in 1992. This moderate increase translates into 326 million person-trips, up from 313 million person-trips a summer ago.

"The increase in volume is mainly due to an improving economy and the end of the Gulf War which depressed travel plans last spring," said Dr. Suzanne Cook, executive director of the Data Center.

The improving economy will play a large role in the rebound of 1992 summer vacation travel. Following months of economic downturn, the first quarter of 1992 posted a 1.4 percent increase in the nation's gross domestic product compared to the first quarter of 1991. While this is not as robust a rate of growth as experienced coming out of previous recessions, it is the best rate of growth since the first quarter of 1989. Contributing to the gain was a 5.3 percent rise in retail sales, reflecting particular strength in the purchase of consumer durable goods, which rose more than 10 percent in the first quarter of 1992 over the same period of 1991.

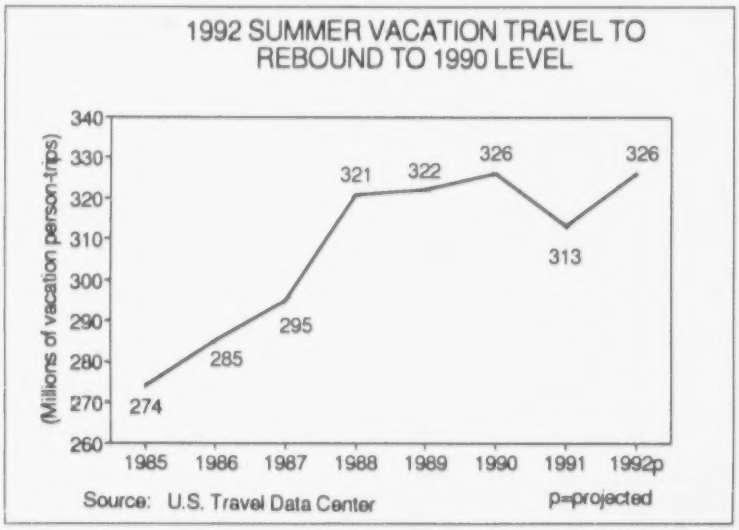
Additionally, other economic indicators provide optimistic information about this summer. Inflation remains under control, personal income is on the rise and there has been a reduction in consumer debt burdens.

Whether consumers do or do not spend money on travel will depend significantly on their perceived confidence in the economy. While the Conference Board's Consumer Confidence Index (CCI) remains below last year's levels, there are signs of renewed consumer confidence in the economy. Since declining in February, the CCI has climbed more than 24 points in the last three months, including a 6.5 point rise in May. This increase indicates a willingness of consumers to spend more money and is an important indicator of future travel industry performance.

In researching the 1992 summer forecast, the Data Center uncovered many significant summer vacation travel trends. For instance, over the past several summers, vacations have been shorter in duration. In the 1992 summer, over 50 percent of travelers will be taking a vacation of three nights or less.

For the third consecutive year, oceans and beaches are expected to be the top destination for 1992 summer vacation travelers. Last summer, plans to take vacations to cities dropped by 7 percentage points from 20 percent to 13 percent. In the 1992 summer, cities are forecasted to gain back a portion of their popularity as 18 percent of summer vacationers are expecting to visit cities.

Despite an optimistic economic future, many 1992 summer travelers are not expecting to change their spending habits from last year. "Travelers this summer will be cautiously optimistic about the economy," said Cook. "We expect them to travel more, but they are likely to remain conservative about the money they are spending."



(Continued on page 3.)

INSIDE

- April Travel Price Index Report
- International Insider
- Discoveries.....

The U.S. Travel Data Center is an affiliate of the Travel Industry Association of America

Travel Costs Drop For First Time In 5 Months

For the first time in five months, the cost of travel in the United States decreased. According to the Data Center's latest Travel Price Index (TPI), the 0.4 percent decline in April travel costs were mainly attributed to a decrease in the cost of lodging, which dropped just over 2 percent.

April's downward slide marks the first time travel expenses have declined since November 1991. More importantly, the decrease may boost the summer vacation season. Overall, the TPI rose 3.2 percent over the same period last year.

TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, decreased to 148.6 (1982-84 = 100) during April. The TPI indicates price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs that travelers actually paid.

The U.S. Travel Data Center releases the Travel Price Index in the last week of every month. For more information on the index contact Joseph P. Horak (202) 293-1040.

TRAVEL PRICE INDEX AND COMPONENTS

APRIL 1992	MONTHLY % CHANGE MARCH 1992 TO APRIL 1992	ANNUAL % CHANGE APRIL 1992 TO APRIL 1991
TPI COMPONENTS		
TRANSPORTATION	1.4	2.2
Airline Fares	1.2	5.0
Intracity Public Trans.	0.0	6.2
Other Intracity Trans.	0.4	4.9
Motor Fuel	1.7	-1.4
LODGING	-2.1	4.8
FOOD AND BEVERAGES AWAY FROM HOME	0.1	2.3
ENTERTAINMENT	0.6	4.4
TRAVEL PRICE INDEX	-0.4	3.2
CONS. PRICE INDEX	0.1	3.2

(SOURCE: U.S. TRAVEL DATA CENTER)

Cook Addresses POW WOW On Summer Travel

Citing an improved economy and international political stability, Data Center's executive director Dr. Suzanne Cook told a gathering of over 150 reporters that summer vacation travel would rise this summer by 4 percent.

In addition, Cook praised the efforts of POW WOW for fostering a productive atmosphere for the travel industry.

"We are encouraged that the renewed strength concerning the intentions of Americans to travel, combined with the opportunities made available through POW WOW to many American travel suppliers to sell travel to international visitors, will bouy a travel industry hard hit last year," Cook said in her remarks.

In addition to praising POW WOW, Cook also spoke about the globalization of the travel industry.

"As the world continues to adjust to many significant events - the end of the Cold War, the opening of Eastern Europe, gradual improvement in the economy in key tourism-generating countries and rapid globalization of business, we find ourselves in interesting times," said Cook. "We believe there will be high growth in the international tourism market. POW WOW, of course, has contributed significantly to this growth in international travel for more than 20 years and will continue to do so in the future."

In her remarks, Cook also reviewed the Data Center's forecast for summer vacation travel. The Data Center is expecting auto travel to increase 4 percent to 268 million person-trips. The recent cut in airfares might also induce more people to take to a vacation this summer.

TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

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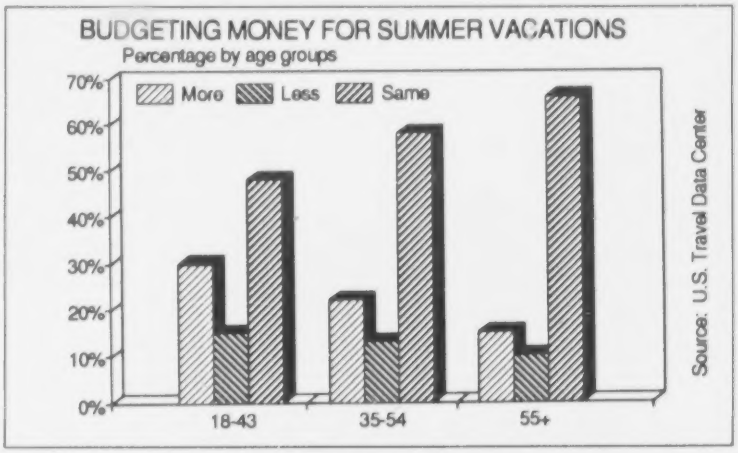
Continued from page 1

One indication of this conservative spending posture is the growing popularity of national parks and camping. For the fourth consecutive year, the National Park Service is expecting more than a 3 percent increase in the volume of visitors to their sites this year. In addition, an American Automobile Association survey of club members showed that three of the top destinations for 1992 summer travel were national parks.

This conservative spending pattern has permeated other areas of the travel industry. The U.S. airlines are discounting rates this summer in hopes of attracting new travelers and hotel/motel operators are providing extensive discounts on rates during the summer. Additional discounts can also be found in many other sectors, including car rental, entertainment and attractions.

A wide majority of 1992 summer travelers will be using cars, trucks or RVs as over 80 percent of summer travelers will climb behind the wheel. The Data Center is expecting summer travelers to take 268 million person-trips by car, truck or RV. This number is up 4 percent over the summer of 1991.

There are indications that airline travel may be on the rebound from a weak 1991. Both domestic and international revenue passenger-miles are up for the year-to-date through March 1991. Recent fare reductions may also help the industry, at least in terms of passenger volume. Domestic revenue passenger-miles are up slightly, but international revenue passenger miles on U.S. carriers have sky-rocketed 38 percent. It is important to note that this increase in international traffic reflects a comparison to last year when the Gulf War depressed the international market.



The U.S. hotel/motel industry is also expecting to see a recovery from last summer, at least in terms of room demand. Cost reductions in airfares will also be a stimulant for the hotel/motel industry. Smith Travel Research, however, projects that room rates will remain flat throughout the summer. The Data Center predicts that 44 percent of all vacationers will use hotel/motels this summer.

Inbound and outbound international travelers will also be important contributors to the expected success of the 1992 summer vacation season. Inbound international travel is one of the fastest growing segments of business for the U.S. travel industry. According to the U.S. Travel and Tourism Administration (USTTA), international visitor arrivals in the U.S rose 8 percent in 1991 and they expect another 6.5 increase in 1992.

In 1992, the USTTA also anticipates a resurgence in travel to areas overseas, especially Europe. The volume of travel to Europe should match the record-setting 1990 summer season. The Summer Olympics in Barcelona and the World Expo in Seville will be two major drawing cards for European travel.

DISCOVERIES.....

USTTA To Publish 1991 International Survey

As more and more international travelers choose the United States as their travel destination, specific information about these travelers becomes vital. Later this month, the United States Travel and Tourism Administration (USTTA) will publish its **1991 In-Flight Survey of International Air Travelers: Overseas Travelers to the United States.** Use this publication to determine demographic profiles, countries of origin, use of pre-paid packages, types of accommodations, transportation used and much more.

The publication costs $200 and may be ordered by calling the Data Center at (202) 293-1040.

"Discoveries" is a travel Printout feature designed to give added exposure to all types of travel-related research. To submit your company's travel research projects, send a brief description of the report including the price, address, and contact name to Joseph Horak, U.S. Travel Data Center, 1133 21st St., N.W. Washington, D.C. 20036.

U.S. Travel Data Center

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MONTH / YR. AGO / YR. TO DATE		
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging (1)	MAR	$5,849	millions	1.4	6.0	6.8
Eating and Drinking Places (2)	APR	$16,142	millions	-0.5	4.1	3.0
Gasoline Service Stations (2)	APR	$10,222	millions	2.2	-1.5	-8.3
Consumer Lodging Demand						
Hotels/Motels Occupancy Rates (3)	MAR	60.6	percent	-1.8	1.3	2.1
Real Demand For Commercial Lodging (4)	MAR	67.2	millions	5.9	4.8	5.7
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	APR	25.9	billions	-6.0	-4.8	-1.0
Int'l Revenue Passenger Miles	APR	9.5	billions	-6.3	23.0	34.1
Highway Traffic Volume (6)						
Rural Arterial Vehicle Miles	MAR	44,903	millions	17.6	3.1	5.1
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	MAR	533.6	millions	21.8	-5.3	-2.7
Travel Price Index (8)						
(1982-1984 = 100)	APR	148.6		-0.4	3.2	2.0
Visitor Vol. at National Park Service Area (11)						
Recreational Visits	MAR	15.1	millions	29.0	3.7	6.1
Overnight Stays	N/A					
Foreign Arrivals to the United States						
From Overseas (12)	DEC	1,448,595		18.8	9.0	7.3
From Canada (13)	MAR	1,693,804		54.6	1.9	7.6
From Mexico (12)	DEC	158,216		58.0	9.9	7.6
U.S. Citizen Departures						
To Overseas (12)	DEC (90)	1,262,000		18.0	3.6	8.0
To Canada (13)	MAR	525,918		5.6	-11.4	0.9
Domestic Demand For Motor Gasoline (14)						
Barrels Per Day	MAR	7,096	thousands	1.3	0.7	2.4

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted, 1986 and 1987 data has been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) U.S. Travel Data Center. (10) U.S. Travel Data Center, data is not comparable to earlier published numbers due to revised methodology. (11) National Parks Service, preliminary, unadjusted for differences in reporting units. (12) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (13) Statistics Canada. (14) U.S. Department of Energy, prelim.

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JULY 1992 Volume 21, Number 6

Autumn '91 Travel Shows Signs Of Recovery

Following a downward slide in travel volume during the summer of 1991, the autumn 1991 travel figures show a rebound within the industry. According to the Data Center's newly published *1991 Autumn Travel Market Report*, the volume of travel during September through November grew substantially over the same period in 1990.

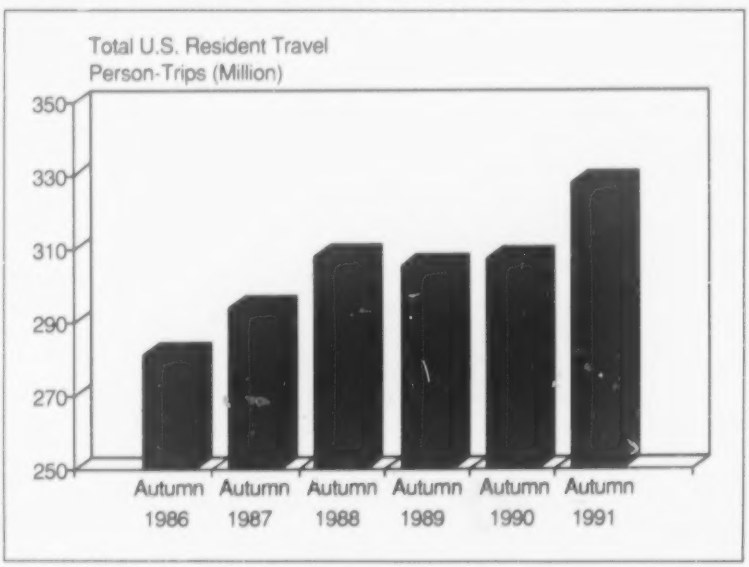
The Gulf War and the recession put a damper on summer travel in 1991, however autumn proved to be a very productive season compared to previous years. During the autumn months of 1991, overall travel rose 7 percent to just over 327 million person-trips, out-distancing autumn 1990's travel volume of 307 million person-trips.

"It appears that at least part of this growth can be attributed to the fact that some travelers postponed their summer trips until Fall," said Suzanne Cook, executive director of the U.S. Travel Data Center. "Additionally, the increase represents a rebound from the autumn of 1990 when travel was dampened by the intensifying Persian Gulf conflict."

With the exception of 1989, autumn travel in the United States has been on an upward trend since 1986.

"The Fall is an important time for travel," said Cook. "It appears more and more people like to avoid the summer vacation rush and wait until the Fall when things are much calmer and less crowded."

The Southeast region of the United States, once again, was the most popular travel destination, hosting the largest number of person-trips during Autumn 1991 (88.7 million person-trips). Travel to the Great Lakes region dropped during the autumn of 1991, while travel to the Midwest picked up slightly.



Two significant segments of the autumn 1991 travel market showed marked improvements over autumn 1990. Weekend travel jumped 19.4 percent, to 169.4 million person-trips in autumn 1990, as compared to 202.5 million last autumn.

Business travel was the other segment that experienced vast improvements compared to autumn 1990. Business and convention travel rose nearly 18 percent from 55.5 million person-trips in Autumn 1990 to 65.2 million during the same period in 1991. This recovery in business and convention travel helped offset significant declines earlier in the year. Business travelers in the autumn of 1991 also were more likely to combine work with pleasure. Fifty-one percent of the business person-trips were considered to be business/vacation trips.

The 1991 autumn travel season continued to reflect many of the same trends evident in earlier surveys. Both the amount of time travelers spent on trips and average party size took a dip compared to autumn 1990. In autumn 1991, the average duration for trips dropped to 3.5 nights. That number is down from 1991's autumn figure of 3.8 nights.

The size of 1991 autumn traveling parties declined modestly from autumn 1990. Last autumn, the average traveling party

(Continued on page 3.)

INSIDE

- May Travel Price Index Report
- Thompson Re-Joins Data Center
- Discoveries.....

Costs Decline For Second Consecutive Month

For the second consecutive month, travel prices declined in the United States. According to the Data Center's latest Travel Price Index (TPI), the 0.4 percent drop in prices in May could be attributed to the lodging industry, which dropped its prices by almost 2 percent, and a 3.2 percent decline in airline fares.

A back-to-back decrease in travel prices last occurred over a three month period last year. During the months of March, April and May of 1991, the cost of travel slid a total of 1.8 percent.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, decreased to 148 (1982-84 = 100) during May. The TPI indicates price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs that travelers actually paid.

The U.S. Travel Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contact Joseph P. Horak at (202) 293-1040.

TRAVEL PRICE INDEX AND COMPONENTS

MAY 1992	MONTHLY % CHANGE APRIL 1992 TO MAY 1992	ANNUAL % CHANGE MAY 1992 TO MAY 1991
TPI COMPONENTS		
TRANSPORTATION	0.3	0.4
Airline Fares	-3.2	2.9
Intracity Public Trans.	0.1	6.0
Other Intracity Trans.	1.1	4.9
Motor Fuel	4.6	-2.6
LODGING	-1.7	6.0
FOOD AND BEVERAGES AWAY FROM HOME	0.1	2.2
ENTERTAINMENT	0.4	3.0
TRAVEL PRICE INDEX	**-0.4**	**3.1**
CONS. PRICE INDEX	**0.1**	**3.0**

(SOURCE: U.S. TRAVEL DATA CENTER)

Thompson Named Market Research Analyst

The U.S. Travel Data Center recently announced that Patrick Thompson has been named market research analyst for the organization. It will be the second-stint at the Data Center for Thompson, who was a research assistant from 1989 to 1990.

"The Data Center is extremely pleased to have Patrick back with us," said Suzanne Cook, executive director of the Data Center. "His knowledge and experience will be a strong asset to our organization."

Thompson graduated from the College of William and Mary in 1989 with a degree in business. Following his initial employment with the Data Center, Thompson was a consultant for the accounting firm of Price Waterhouse.

In his new position, Thompson will be responsible for both the management of the National Travel Survey and client projects. He will also be involved with the day-to-day operations of the research department headed by the manager of market research Elizabeth Stewart.

Thompson replaces Kelly Repass, who has been hired by the Orlando/Orange County Convention and Visitors Bureau.

"We are excited for Kelly and her new opportunities. We look forward to working with her in her new capacity," said Stewart. "Patrick will be able to make a quick transition and do an exceptional job taking over where Kelly left off."

Currently, the market research department is putting the finishing touches on the 1991 National Travel Report. In mid-June, the 1991 Autumn Travel Market Report was released.

TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

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Continued from page 1

size was 1.86 while in autumn 1990 it was 1.88.

Auto/truck/RV person-trips, along with air transportation, were again the most popular forms of transportation in the 1991 autumn. Travelers took 259.2 million person-trips by auto/truck/RV, which is an increase of 6.8 percent over 1990 autumn numbers of 242.7 million person-trips. Air transportation declined slightly over the previous autumn. In the autumn of 1991, 51.1 million person-trips were taken by air, a one percent drop from 1990's autumn number of 51.6 million.

In Autumn 1991, of the total 327.7 million person-trips, 74 percent were taken to visit friends or relatives, for outdoor recreation or other entertainment purposes. A high percentage of the Autumn 1991 travelers stayed in hotels and motels or with friends and relatives during their trips, 45 percent and 41 percent of all person-trips, respectively.

Demographically, the majority of autumn 1991 travelers were married (51%) and male (54%). Forty-five percent were between the ages of 25 and 44, while 47 percent worked in a professional/managerial or other white collar positions.

The *1991 Autumn Travel Market Report: Results From The National Travel Survey* may by purchased for $100 by contacting the Data Center's marketing department at (202) 293-1040. (Data Center members will be receiving a complimentary copy.)

DISCOVERIES.....

New Book Explores "The Seasons of Business"

American Demographics has recently published a comprehensive book, *The Seasons of Business: The Marketer's Guide to Consumer Behavior*, which offers insight into consumer trends and habits throughout the seasons of the year.

"Supported by a wealth of facts and figures and a comprehensive index covering activities ranging from shopping to television viewing to honeymooning to travel, a holistic view of the consumer emerges. A must for marketers and researchers seeking to better understand and compete for consumers' time and money," said Suzanne Cook, executive director of the U.S. Travel Data Center.

This publication walks the reader through each month, citing the items that are most likely to be on sale in that month and how the weather and holidays affect consumers' motivation and buying habits.

In addition to trends concerning the marketplace, the publication also explores societal trends that may affect product markets and consumers.

Data Center seasonal travel information and figures are included in the book along with facts on business travel and recommendations for the best time to travel.

This authoritative publication is available for $34.95 and may be ordered by calling American Demographics at 1-800-828-1133 or by writing to American Demographic Books, P.O. Box 68, Ithaca, NY 14851.

MORE DISCOVERIES...

USTTA Publishes 1991 In-Flight Inbound Survey

The United States Travel and Tourism Administration (USTTA) has recently released its *1991 In-Flight Survey of International Air Travelers: Overseas Travelers to the United States* (Inbound). Fifty-four participating airlines and more than 40,000 respondents make the 1991 In-Flight Survey the most comprehensive survey on overseas visitors to the United States.

The Immigration and Naturalization Service and USTTA reported more than 16 million overseas travelers to the U.S. in 1991, excluding travelers from Mexico and Canada. The 1991 In-Flight Survey can be used to determine, by overseas country of residence, the U.S. destinations they visited, how long they stayed, how much they spent, the type of accommodations they used, their purpose of trip, the activities they participated in, whether they used a pre-paid package or not, how they booked the air and lodging portions of their trip, their port of entry and more.

The 1991 Inbound In-Flight Survey is available for $200. For an additional $200, these data will also be provided in Lotus 1-2-3. This information is also available in custom banner reports which you design to focus on your destination or market of interest. To order the Inbound 1991 In-Flight Survey or for more information, please contact the Data Center's marketing department at (202) 293-1040.

In addition, the USTTA also has available the *1991 In-Flight Survey Annual Inbound Country Specific Reports*. Compiled from the In-Flight Survey, these publications provide detailed descriptions for travelers to the U.S. from Australia, Brazil, France, Italy, Japan, U.K., Venezuela, Germany and Mexico. These publications may be purchased from the Data Center for $200 each.

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	APR	$5,786	millions	-1.1	2.6	5.7
Eating and Drinking Places (2)	MAY	$16,472	millions	0.1	1.9	4.8
Gasoline Service Stations (2)	MAY	$10,118	millions	-0.8	-5.6	-5.0
Consumer Lodging Demand					
Hotels/Motels Occupancy Rates (3)	APR	61.4	percent	1.3	-1.0	1.3
Real Demand For Commercial Lodging (4)	APR	67.3	millions	0.2	2.8	4.9
Airline Passenger Traffic (5)					
Domestic Revenue Passenger Miles	MAY	27.3	billions	5.7	-0.8	-1.0
Int'l Revenue Passenger Miles	MAY	10.5	billions	10.9	10.5	28.1
Highway Traffic Volume (6)					
Rural Arterial Vehicle Miles	APR	46,168	millions	2.7	6.3	5.5
Rail Passenger Traffic (7)					
Amtrak Passenger Miles	APR	547.4	millions	2.6	13.1	1.2
Travel Price Index (8)					
(1982-1984 = 100)	MAY	148		-0.4	3.1	2.2
Visitor Vol. at National Park Service Areas (11)					
Recreational Visits	APR	21.4	millions	38.4	11.0	7.8
Overnight Stays	APR	998,437		42.0	9.0	7.0
Foreign Arrivals to the United States					
From Overseas (12)	DEC (91)	1,448,595		18.8	9.0	7.3
From Canada (13)	APR	1,566,066		-7.5	2.3	6.1
From Mexico (12)	DEC (91)	158,216		58.0	9.9	7.6
U.S. Citizen Departures					
To Overseas (12)	DEC (90)	1,262,000		18.0	3.6	8.0
To Canada (13)	APR	651,231		23.8	9.7	3.4
Domestic Demand For Motor Gasoline (14)					
Barrels Per Day	APR	7,348	thousands	2.8	3.0	2.7

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted, 1986 and 1987 data has been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) U.S. Travel Data Center. (10) U.S. Travel Data Center, data is not comparable to earlier published numbers due to revised methodology. (11) National Parks Service, preliminary, unadjusted for differences in reporting units. (12) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (13) Statistics Canada. (14) U.S. Department of Energy, prelim.

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AUGUST 1992 Volume 21, Number 7

TRAVEL VOLUME RISES IN UNITED STATES FOR SIXTH CONSECUTIVE YEAR IN 1991

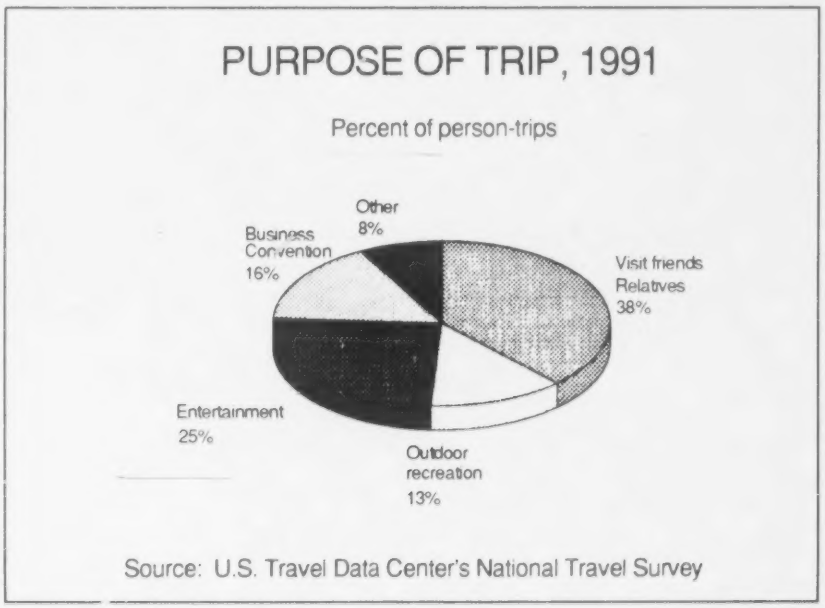
For the sixth consecutive year the volume of travel in the United States increased, according to the U.S. Travel Data Center's 1991 National Travel Survey. Last year, Americans took more than 1.3 billion person-trips*, an increase of 2.5 percent over 1990. The increase was primarily led by weekend trips, which grew 13.6 percent. Shorter trip durations, however, resulted in nearly a 2.5 percent decline in total person-nights for the year.

In 1991, 16 percent of 1.3 billion person-trips were classified as business or convention travel, 69 percent were considered vacation and 59 percent took place over a weekend or long weekend. Visiting friends and relatives remained the number one reason Americans traveled in 1991. It was closely followed by Americans who traveled for entertainment purposes (25%).

As in previous years, many 1991 travelers used auto/truck/RV transportation (80%), stayed in commercial lodging (43%) and ventured more than 800 miles on the average trip. They traveled primarily for pleasure: visiting friends and relatives, outdoor recreation or entertainment purposes (76%).

In addition, the Data Center's National Travel Survey also revealed the continuation of other trends. Travelers in 1991 took shorter trips, staying fewer nights away from home. In 1989, the average round trip distance was 910 miles. That number dropped in 1990 to 839 miles and last year the number dropped further to just over 800 miles. Over the last few years, the duration of trips has also declined slightly, from 4.1 nights in 1990 to 3.9 nights last year.

The popularity of shorter trips has become evident in the last few years, taking a big jump between 1989 and 1990. More than 767 million weekend person-trips were taken last year, up 13.6 percent from 1990.



Source: U.S. Travel Data Center's National Travel Survey

"Shorter trips continue to be the dynamic growth area in travel," said Suzanne Cook, executive director of the Data Center. "Many people don't have the time or the financial means to take longer excursions. Although they are taking shorter trips, the average traveler is taking more trips as reflected in the overall rise in travel last year."

Once again, the South Atlantic region of the United States was the most popular destination for travelers (22%). The East North Central region was the second most popular, garnering 12 percent of all U.S. travelers.

Travelers in 1991 favored auto/truck/RV modes of transporta-

(Continued on page 3.)

INSIDE

- June Travel Price Index Report
- 1991 Travel Ads Drop
- Travel Outlook Forum

Prices Rise For First Time In Two Months

For the first time in two months the cost of travel rose in the United States. According to the U.S. Travel Data Center's Travel Price Index (TPI), the 0.7 percent rise in travel costs can be attributed to a rise in lodging rates and the cost of motor fuel.

Despite the rise in the overall cost of travel, airfares in the month of June plummeted 6.5 percent, reflecting the airfares war that began in early June. Overall, the TPI rose 3.1 percent compared to the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 149.09 (1982-84=100) during June. The TPI indicates price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs the travelers actually paid.

The Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contact, Joseph P. Horak.

TRAVEL PRICE INDEX AND COMPONENTS

JUNE 1992	MONTHLY % CHANGE MAY 1992 TO JUNE 1992	ANNUAL % CHANGE JUNE 1992 TO JUNE 1991
TPI COMPONENTS		
TRANSPORTATION	-1.7	-1.0
Airline Fares	-6.5	-4.3
Intracity Public Trans.	0.1	6.2
Other Intracity Trans.	0.2	4.8
Motor Fuel	3.5	2.4
LODGING	3.2	7.4
FOOD AND BEVERAGES AWAY FROM HOME	0.2	2.0
ENTERTAINMENT	-0.4	2.0
TRAVEL PRICE INDEX	**0.7**	**3.1**
CONS. PRICE INDEX	**0.4**	**3.1**

(SOURCE: U.S. TRAVEL DATA CENTER)

Discoveries...

Travel Advertising Drops 5 Percent In 1991

Travel industry advertising declined by 5 percent in 1991 according to Ogilvy and Mather's 1992 annual **Trends in Travel and Tourism Advertising Spending** study. Although the drop varied widely by market segments, the study reported that the total industry spending declined by $62 million.

The greatest drop in advertising spending was seen among U.S. flag airlines. The study found that this segment showed a drop of $72 million, down 12 percent from 1990. In comparison, foreign countries exhibited a 24 percent increase in their 1991 advertising expenditures within the United States. The study reported that this escalation was an attempt to restore their lost traffic, which declined 16 percent in the key U.S.-to-Europe market in 1990.

The Ogilvy and Mather study analyzes in detail the past five years of consumer advertising spending by U.S. and foreign airlines, cruise lines, domestic destinations (including U.S. states and other domestic destinations); and foreign destinations (including Mexican resorts, Canadian provinces and other foreign destinations). Total category spending and expenditures by each category's leaders and their allocation by media are compared to the last five years.

The 1992 edition of **Trends in Travel and Tourism Advertising Spending** is available for $100 and can be obtained by sending a check to Ed Berrol at Ogilvy and Mather, 309 West 49th Street, New York, New York, 9th Floor, (212) 237-4662.

TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

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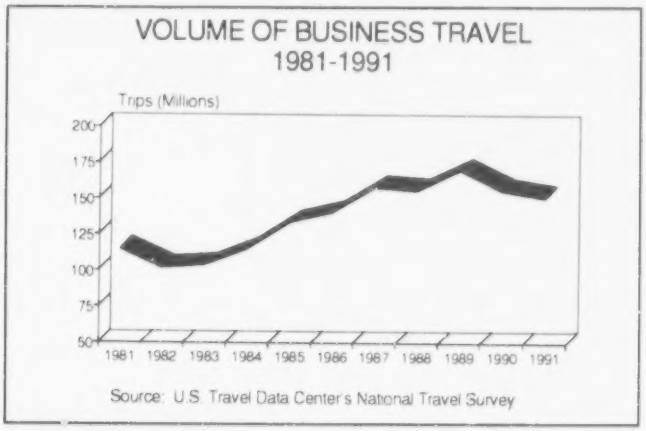
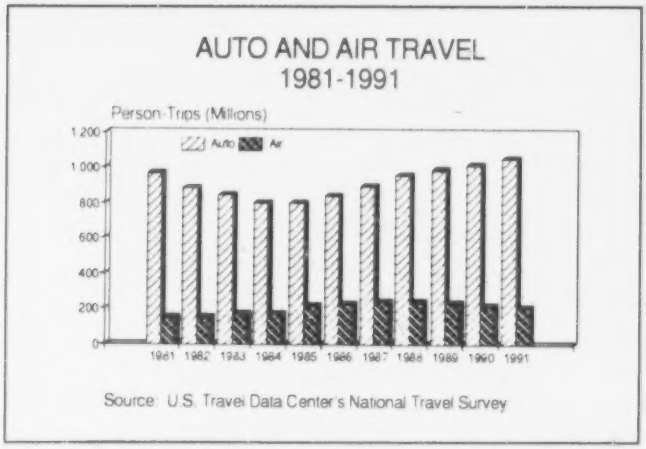
Continued from page 1 tion, registering 1.05 billion person-trips, which was nearly a 4 percent increase over 1990. Additionally in 1991, the number of persons-per-trip increased for the third straight year, rising from 2.09 person- per-trip in 1990 to 2.12 in 1991.

Air travel declined in the United States in 1991. Americans took just over 205 million person-trips by air in 1991, nearly a 4 percent decline from 1990.

Business travel experienced a decline of 3 percent during 1991, as 150.6 million trips were taken. Americans traveling for business purposes averaged much shorter round-trip distances in 1991 than in 1990 (862 miles vs. 1,020 miles). The average duration of a business trip was 3.8 nights in 1991, compared to 3.7 nights during the previous year. Automobiles were the primary mode of transportation for 1991 business trips (55%), down from 58 percent a year ago.





The National Travel Survey is a telephone survey conducted with a national probability sample of 1,500 U.S. adults per month and has been in continuous operation since 1979. Proprietary questions may be added and custom tabulations requested. For more information, or to order a copy of the 1991 National Travel Survey Market Report ($165), contact the marketing department at (202) 293-1040. (Data Center members will be sent a complimentary copy.)

(*A person-trip is one traveler taking one trip 100 miles or more, one-way, away from home.)

October 28.....

Travel Outlook Forum Scheduled For Oct. 28

The 18th Annual Travel Outlook Forum will be held October 28 at the Sheraton Washington Hotel in Washington, D.C. The theme for the 1992 forum is "Motivating The Consumer: Challenges And Opportunities For The '90's".

This year's event, sponsored by the Data Center and the Travel and Tourism Research Association (TTRA), will be held in conjuction with the Travel Industry Association's 1992 Travel Industry National Conference.

The day-long forum will feature marketing experts, academicians and analysts from every segment of the travel and tourism industry. These experts will forecast the travel and tourism trends in 1993, as well as weigh the events of the past.

Several prominent industry experts have already confirmed plans to speak at the forum, including Steve Malin, manager, public information at the Federal Reserve; Harvey Shields, director, office of research, U.S. Travel and Tourism Administration (USTTA); John Riener, president, Carlson Travel Network-Commercial; and many more.

For registration information and a program outlining the 1992 Forum, contact the Data Center at (202) 293-1040 or by fax at (202) 293-3155.

Other Speakers include:

- Thomas Crosby, AAA
- David Swierenga, Air Transport Association
- Randy Smith, Smith Travel Research
- Beverly Shipka, American Airlines
- Barbara Wickliffe, Best Western International
- Peter Mason, Better Homes and Gardens
- David Stroud, Kissimmee/St. Cloud CVB
- Watts Wacker, Yankelovich Clancey Shulman
- Suzanne Cook, Executive Director, Data Center
- Jerry Foster, Chairman, Data Center
- Joan McClellan, President, TTRA
- Hank Brandt, Official Airlines Guide

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	MAY	$5,773	millions	-0.2	3.1	4.4
Eating and Drinking Places (2)	JUNE	$16,287	millions	-0.6	-0.1	3.8
Gasoline Service Stations (2)	JUNE	$10,561	millions	1.6	-0.8	-3.8
Consumer Lodging Demand					
Hotels/Motels Occupancy Rates (3)	MAY	62.3	percent	1.5	0.2	2.9
Real Demand For Commercial Lodging (4)	MAY	68.4	millions	1.7	4.2	5.1
Airline Passenger Traffic (5)					
Domestic Revenue Passenger Miles	JUNE	32.0	billions	17.1	9.1	0.8
Int'l Revenue Passenger Miles	JUNE	11.8	billions	12.6	6.8	23.3
Highway Traffic Volume (6)					
Rural Arterial Vehicle Miles	MAY	49,179	millions	6.9	3.8	5.0
Rail Passenger Traffic (7)					
Amtrak Passenger Miles	MAY	521.4	millions	-4.8	-3.8	0.1
Travel Price Index (8)					
(1982-1984 = 100)	JUNE	149.1		0.7	3.1	2.4
Visitor Vol. at National Park Service Areas (9)					
Recreational Visits	MAY	26.2	millions	22.5	4.2	6.6
Overnight Stays	MAY	1.6	millions	60.0	3.0	5.0
Foreign Arrivals to the United States					
From Overseas (10)	MAR	1,275,424		5.7	13.8	26.5
	FEB	1,206,826		-0.4	51.8	34.3
	JAN	1,211,763		-16.4	20.5	20.5
From Canada (11)	MAY	1,470,499		-6.1	0.6	4.9
From Mexico (10)	MAR	94,390		8.9	-24.6	3.6
	FEB	86,643		-6.2	32.3	29.2
	JAN	92,327		41.7	26.4	26.4
U.S. Citizen Departures					
To Canada (11)	MAY	1,064,327		63.4	0.5	2.4
Domestic Demand For Motor Gasoline (12)					
Barrels Per Day	MAY	7,315	thousands	0.8	-1.6	1.5

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) National Parks Service, preliminary, unadjusted for differences in reporting units. (10) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (11) Statistics Canada. (12) U.S. Department of Energy, prelim.

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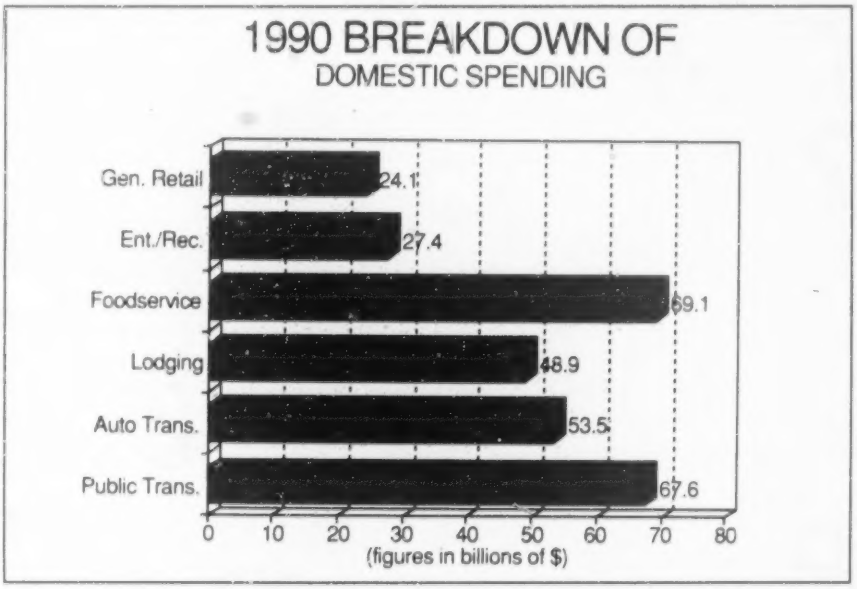
Travelers In The U.S. Increased Spending 7.9 Percent In 1990 To Nearly $334 Billion

The amount travelers spent in the United States increased 7.9 percent in 1990 to $333.9 billion according to the U.S. Travel Data Center's *1990 Impact of Travel on State Economies*. U.S. residents spent over $290 billion, while foreign travelers expended $43.3 billion in the United States. This report is based on the Data Center's Travel Economic Impact Model (TEIM), the only national model which produces the economic impact of travel and tourism at the national, state and local levels.

The total direct and indirect impact of domestic travel on the U.S. economy also increased, producing $698.0 billion in expenditures and output. This represents a 10.2 percent increase over 1989's $633.2 billion figure.

Domestic spending on entertainment and recreational activities took the largest jump of any category, increasing 9.5 percent over 1989 to $27.4 billion. Lodging expenditures also increased by 7.8 percent to $48.9 billion, while foodservice rose 6.6 percent to $69.1 billion.

The *1990 Impact of Travel on State Economies* also reported that travel spending in the United States generated over $46 billion in tax revenue for federal, state and local governments. This number reflects a $7 billion increase over 1989 tax revenue numbers.



The travel industry also had a positive effect on employment. Travel expenditures generated by U.S. and international visitors directly generated 6 million jobs in 1990, paying more than $90.2 billion in wages and salaries. These numbers reveal only the impact that travel has on direct employment. Including indirect employment figures, the travel industry generated almost 11 million jobs.

The Data Center estimates that on the average, every $48,333 spent on travel in the United States directly supported one job in 1990. In 1989, every $53,200 directly supported one job.

"Travel industry employment has remained stable through these tough economic times," said Bill Evans, manager of economic studies for the Data Center. "The travel industry continues to outperform total U.S. employment figures."

The increase in the travel industry's revenue might be partially caused by an 8.3 percent increase in the cost of travel services in 1990. This number is over 2 percent higher than the rise in consumer prices.

Although the *1990 Impact of Travel on State Economies* presents nation-wide numbers, the report also concentrates on the impact of travel on individual state's economies.

continued on page 3

INSIDE

- Travel Prices Increase 1.5 Percent
- **Budget Cuts Threaten Important Research**

Travel Prices Rise 1.5 Percent In July

The cost of traveling in the United States jumped 1.5 percent in July, according to the U.S. Travel Data Center's Travel Price Index (TPI). It was the largest cost increase since January, when prices leaped 2 percent.

The increase in the costs of lodging and air fares contributed to the rise as both industries reported price hikes of over 3 percent. The percent change in these components reflect the full price fares and room rack rates. They do not reflect the recent price wars and discounting present in both industries. Overall, the TPI rose 3.3 percent compared to the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 151.4 (1982-84=100) during July. The TPI indicates the price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs the travelers actually paid.

The Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contact Joseph P. Horak (202) 293-1040.

TRAVEL PRICE INDEX AND COMPONENTS

JULY 1992	MONTHLY % CHANGE JUNE 1992 TO JULY 1992	ANNUAL % CHANGE JULY 1992 TO JULY 1991
TPI COMPONENTS		
TRANSPORTATION	1.5	1.8
Airline Fares	3.2	-0.9
Intracity Public Trans.	0.2	5.6
Other Intracity Trans.	-0.9	2.5
Motor Fuel	-0.1	4.7
LODGING	3.4	6.2
FOOD AND BEVERAGES AWAY FROM HOME	0.1	1.8
ENTERTAINMENT	0.6	2.3
TRAVEL PRICE INDEX	**1.5**	**3.3**
CONS. PRICE INDEX	**0.2**	**3.2**

(SOURCE: U.S. TRAVEL DATA CENTER)

Cook Addressed U.S. Economy In Brussels

Emphasizing global cooperation to promote tourism, U.S. Travel Data Center Executive Director Suzanne Cook addressed the European press corps at the recent Travel Industry Association of America's POW WOW Europe convention in Brussels, Belgium.

Citing marketing agreements the Data Center has with the World Tourism Organization and the European Travel Intelligence Center, Dr. Cook spoke of the importance of exchanging key information concerning travel trends within Europe and the rest of the world. In addition to her remarks on the significance of global tourism, Dr. Cook also provided information on the U.S. economy and its effect on U.S. travelers.

Dr. Cook reported that in the first quarter of 1992 travel remained weak, down 1.2 percent in volume as compared to the same period in 1991. However, Dr. Cook emphasized that there is evidence to suggest that the numbers will improve. Specifically, she cited, the air fare wars as possibly having a dramatic effect on the travel industry.

"The Data Center estimates that these lower fares will induce at least nine million more U.S. adults to use airlines that would not have if fares were higher," said Dr. Cook.

As evidence for the increase, Dr. Cook cited recent numbers that showed domestic passenger-miles up 13 percent in July. In addition, she quoted numbers that reflected a 20 percent increase in international passenger-miles this year.

TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; Foreign countries, $80. ISSN: 0744-6233

SPECIAL REPORT...

U.S. & European Travel Industries Seek Congressional Funding For Key Air Traffic Data

The U.S. Department of Transportation still lacks the funding required to complete its computer processing of the U.S. international air travel statistics (INS Form I-92) for 1991 and beyond.

This problem has been raised to a crisis situation because of the U.S. House of Representatives' subcommittee ruling which deleted the funding from DOT's budget for FY1993. The U.S. Senate restored only half of the DOT Research and Special Programs Administration's (RSPA) budget, but nothing will be done until late September when the House and Senate must vote on reconciling the difference. If full funding of $600,000 is not provided to RSPA for processing the I-92 data, the only source for U.S. citizen departure data will remain unavailable to the travel industry for 1991, 1992 and beyond.

The INS I-92 Form is still being collected, but the Department of Transportation has not had funds to process these data since they released the April 1991 figures. The I-92 is the only source of U.S. citizen outbound origin-destination data released to the travel industry.

Without the statistics, the United States Travel and Tourism Administration (USTTA) will be unable to publish the expanded data from its 1991 and 1992 In-Flight Survey, which focuses on U.S. traveler visitation to overseas countries. In addition to critical market planning information on travel patterns, characteristics and spending of U.S. citizens will be unavailable. This means the U.S. Department of Commerce, through the Bureau of Economic Analysis, cannot accurately measure the U.S. travel surplus. The lack of I-92 data, if not resolved, may also have implications for data on international travelers to the U.S.. If the airlines that voluntarily participate in the USTTA In-Flight Survey do not receive the U.S. outbound data, they might start to withdraw from the program, causing the inbound data on non-residents to also suffer.

In the most recent issue of the European Travel Marketing Report, ***Trans-Atlantic***, the European Travel Commission came out in support of both the Department of Transportation and the USTTA in their efforts to restore funding to this vitally important program.

TO VOICE YOUR SUPPORT CONTACT:

Barbara Franklin, Secretary of Commerce, U.S. Commerce Department, 14th and Constitution Ave., NW, Washington, D.C. 20230 and to Andy Card, Secretary of Transportation, U.S. Department of Transportation, 400 7th St, SW, Washington, D.C. 20590.

The following are key congressional leaders who could have an impact on DOT funding. The Honorable Frank Lautenberg (D-NJ), Chairman, and the Honorable Al D'Amato (R-NY), Ranking Minority Leader. Their addresses are: Subcommittee on Transportation, Committee on Appropriations, United States Senate, Washington, D.C. 20510. The main House of Representatives contacts are: The Honorable William Lehman (D-FL), Chairman, and the Honorable Larry Coughlin (R-PA) Ranking Minority Leader. They can be reached by writing to: Subcommittee on Transportation, Committee on Appropriations, U.S. House of Representatives, Washington, D.C. 20515.

continued from page 1

"States are beginning to realize what an impact travel has on their economies," said Suzanne Cook, executive director of the Data Center. "The travel industry produces jobs and tax revenue that assist is giving states a solid tax base."

As in 1989, California garnered the largest share of U.S. resident spending in 1990. California represented 13.9 percent of the total market. Florida was second, taking 9 percent.

Only three states posted double-digit increases in domestic travel spending during 1990, down from 1989's 5 states and the District of Columbia. The national average increase for state travel spending was 6.5 percent.

"A portion of the drop among states was related to the economy, as the recession began in the fourth quarter of 1990," said Evans. "In addition, the price of oil jumped during the fourth quarter due to the Gulf Crisis and deterred some travelers from leaving home."

United States domestic travel expenditures have grown significantly over the years. In 1977, total domestic travel revenue totaled just over $100 billion. The totals have steadily increased over the years leading up to 1990's $290 billion.

The *1990 Impact of Travel on State Economies* can be obtained for $70 from the Data Center's marketing department. To place an order or get additional information, please call (202) 293-1040. (Data Center members will be receiving a complimentary copy.)

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	JUNE	$6,547	millions	13.4	4.2	4.7
Eating and Drinking Places (2)	JULY	$16,219	millions	0.9	0.3	2.7
Gasoline Service Stations (2)	JULY	$10,655	millions	0.2	1.5	-2.8
Consumer Lodging Demand					
Hotels/Motels Occupancy Rates (3)	JUNE	62.4	percent	0.2	1.1	2.5
Real Demand For Commercial Lodging (4)	JUNE	72.5	millions	6.0	3.5	4.2
Airline Passenger Traffic (5)					
Domestic Revenue Passenger Miles	JULY	35.4	billions	10.6	13.1	2.9
Int'l Revenue Passenger Miles	JULY	12.9	billions	8.8	6.0	19.8
Highway Traffic Volume (6)					
Rural Arterial Vehicle Miles	MAY	49,179	millions	6.9	3.8	5.0
Rail Passenger Traffic (7)					
Amtrak Passenger Miles	JUNE	450.4	millions	-13.6	-21.8	-4.0
Travel Price Index (8)					
(1982-1984 = 100)	JULY	151.4		1.5	3.3	2.5
Visitor Vol. at National Park Service Areas (9)					
Recreational Visits	JUNE	32.6	millions	24.5	-1.9	4.1
Overnight Stays	JUNE	2.4	millions	50.7	-6.0	0.9
Foreign Arrivals to the United States					
From Overseas (10)	APR	1,313,347		3.0	16.9	23.8
From Canada (11)	JUNE	1,312,060		-10.8	-7.5	2.7
From Mexico (10)	APR	126,963		34.5	34.2	11.7
U.S. Citizen Departures					
To Canada (11)	JUNE	1,446,716		35.9	-6.41	-0.5
Domestic Demand For Motor Gasoline (12)					
Barrels Per Day	JUNE	7,398	thousands	1.5	-0.8	1.1

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) National Parks Service, preliminary, unadjusted for differences in reporting units. (10) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (11) Statistics Canada. (12) U.S. Department of Energy, prelim.

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Research News for the U.S. Travel Industry

OCTOBER 1992 Volume 21, Number 9

Tourism's Top Twenty Provides Answers To Many Questions About The Travel Industry

Here's a little quiz for you.

Can you name the state that has the largest tourism advertising budget in the United States?

ANSWER: Texas

What was the top theme park in the United States in 1989?

ANSWER: Walt Disney World/MGM Studios/Epcot Center, Lake Buena Vista, Florida

Which National Park is the largest by acreage?

ANSWER: Wrangell-St. Elias National Park, Alaska

What airline spent the most on advertising in 1991?

ANSWER: Delta

The U.S. Travel Data Center, in conjunction with the Business Research Division of the University of Colorado, will soon publish the fourth edition of **Tourism's Top Twenty**, a book aimed precisely at answering these kinds of questions.

"This publication will answer many of the questions most asked by travel industry people who contact us," said Suzanne Cook, executive director of the Data Center.

Tourism's Top Twenty, published every four years since 1980, presents facts and trends that make up not only the domestic travel and leisure industry, but also encompasses facts relating to the international travel market.

"Our goal in publishing this book is to provide a quick fact book so users don't have to dig through 50 different volumes to find facts they need to know," said Dr. Charles Goeldner, professor of marketing and tourism at the University of Colorado. "We have already done the work for you."

"We have taken the most current numbers and made them available in one convenient package." --Dr. Charles Goeldner, professor of marketing and tourism at the University of Colorado

This book provides a wide range of listings from the most frequently used ports of entry and departure for international inbound and outbound travelers to the top participation sports in the United States. The publication also lists the top hotels, motels and resorts in the world by number of properties, room sales and number of rooms. In addition, listings provide information on advertising expenditures of airlines, cruise lines and states along with information pinpointing the most widely-used travel agencies in the United States and their incomes. Top states for hunting and fishing licenses are also listed.

A sample of additional information available in this publication follows:

**In 1991, McDonald's was the largest restaurant chain in the world with 11,803 locations. Kentucky Fried Chicken was next with 8,187.

**In 1990, American Airlines carried more passengers (73,227) than any other U.S. passenger airline. Delta was second with 65,729 passengers.

**American Express was the highest grossing travel agency in 1991, accumulating $6.9 billion in sales.

**The Hertz Corporation was the leading car rental company in the United States in 1989 with $3.1 million in total sales in 1989.

Taking research from many different sources, this publication combines information from state agencies, federal bureaus, private industry and trade publications.

" We have taken the most current numbers and made them available in one convenient package," said Goeldner.

With over 100 fact-filled pages, **Tourism's Top Twenty** is a bargain at $50. For more information or to order a copy of **Tourism's Top Twenty**, contact the Data Center's marketing department at (202) 293-1040. (Full and state members receive a 20% discount.)

SPECIAL ANNOUNCEMENT:
The U.S. Travel Data Center will have its annual membership meeting prior to the Travel Outlook Forum, October 28 in Washington D.C. at the Sheraton Washington Hotel. The meeting will be held in the Dover Room from 7:45 a.m. to 8:45 a.m. Data Center members and non-members are encouraged to attend. The Data Center staff will review custom research available through the Data Center.

Cost Of Traveling In U.S. Inches Up In August

For the third consecutive month the cost of traveling in the United States inched higher. According to the U.S. Travel Data Center's Travel Price Index (TPI), the price of traveling rose 0.3 percent in August.

A 1.3 percent increase in the costs of lodging and a 0.9 percent rise in the price of entertainment offset a drop in the price of transportation and air fares. The percent change in these components reflect the full price fares and room rack rates. They do not reflect the recent price wars and discounting present in both industries. Overall, the TPI rose 2.7 percent compared to the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 151.8 (1982-84=100) during August. The TPI indicates the price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs the travelers actually paid.

The Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contract Joseph P. Horak (202) 293-1040.

TRAVEL PRICE INDEX AND COMPONENTS

AUGUST 1992	MONTHLY % CHANGE JULY 1992 TO AUGUST 1992	ANNUAL % CHANGE AUGUST 1992 TO AUGUST 1991
TPI COMPONENTS		
TRANSPORTATION	-1.3	-0.5
Airline Fares	-1.5	-3.3
Intracity Public Trans.	0.2	5.7
Other Intracity Trans.	-1.1	2.0
Motor Fuel	-1.1	2.4
LODGING	1.3	6.0
FOOD AND BEVERAGES AWAY FROM HOME	0.1	1.7
ENTERTAINMENT	0.9	2.9
TRAVEL PRICE INDEX	**0.3**	**2.7**
CONS. PRICE INDEX	**0.3**	**3.2**

(SOURCE: U.S. TRAVEL DATA CENTER)

TIA Announces A New Travel Industry Survey

In an effort to aid the marketing efforts of its members and the U.S. travel industry it serves, as well as provide economic analysts and consumers a greater understanding of the travel and tourism industry, the Travel Industry Association of American (TIA) this month released the first quarterly edition of Travelometer (SM), a new and unique survey of U.S. travelers.

Indicating that, for the fall 1992 travel season, most Americans who travel plan to travel as much or more than they did last year, and that travelers feel generally comfortable about the state of their own finances and that of the U.S. economy as well.

"It is a service to our members and to the industry they comprise, providing them with a forecasting and short-term marketing tool," said TIA President Edward R. Book. " It carries out the mandates of TIA's charter and current Strategic Plan in doing so by positioning TIA as an entity for promoting and explaining the nation's travel industry."

Commissioned by TIA, the U.S. Travel Data Center prepares the Travelometer by incorporating new questions each quarter into its National Travel Survey. Based upon data collected each month by telephone interviews from a national probability sample of 1,500 adults, the National travel Survey serves as the basis for a wide variety of respected and reliable reports.

The Travelomenter is available on a quartertly basis ($15) or by yearly subscription ($50). For more information, contact Kirsten Luescher at (202) 293-1433.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America.

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; outside the U.S., $80. ISSN: 0744-6233

Travel Outlook Forum Schedule Set

The following is the final schedule for the U.S. Travel Data Center's 18th Annual Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association, to be held October 28, 1992 at the Sheraton Washington Hotel in Washington D.C.

7:30 AM Registration

7:45-8:45 AM

CONTINENTAL BREAKFAST

Sponsored by AAA World Magazine

8:45-9:00 AM

1993 TRAVEL OUTLOOK FORUM WELCOME

- Peter Shelly, Vice President of Sales, Radisson Hotels International, and Chairman, 1992 Travel Industry National Conference/1993 Travel Outlook Forum Planning Meeting
- Edward R. Book, President, Travel Industry Association of American
- Jerry Foster, President, Travellers International, and Chairman, U.S. Travel Data Center
- Joan McClellan, President, McClellan Corporation International and President, Travel and Tourism Research Association
- Suzanne D. Cook, Executive Director, U.S. Travel Data Center

9:00-9:30 AM

1993 OUTLOOK -- THE ECONOMY

- Eugene J. Sherman, Senior Advisor, Federal Home Loan Bank of New York

9:30-10:00 AM

TRAVEL TRENDS IN 1992

- Suzanne D. Cook, Executive Director, U.S. Travel Data Center

10-10:15 AM

COFFEE BREAK

Sponsored by Travel & Meetings Digest

10:15-10:45 AM

1993 OUTLOOK -- INTERNATIONAL TRAVEL

- Harvey M. Shields, Director, Office Of Research, U.S. Travel And Tourism Administration.

10:45-11:45 AM

REGIONAL TRAVEL OUTLOOK

MODERATOR:

- Jerry Foster, President, Travellers International, and Chairman, U.S. Travel Data Center

PANEL:

- Glenn O. Couvillon, Managing Director, Travel South USA
- John F. Edman, Executive Director, Mississippi River Country, USA
- Brad Smith, Executive Director And CEO, Foremost West, Four Corners Regional Tourism Organization

12:00 noon-1:30 PM

LUNCHEON

Sponsored by Travel Weekly Newspaper and Las Vegas Convention and Visitors Authority

Presentation By:

- Alan Fredericks, Editor-In-Chief, *Travel Weekly* Newspaper

CONCURRENT SESSIONS

1:45-2:45 pm

SESSION I: Outlook For Air And Auto Travel

MODERATOR:

- Dr. Douglas C. Frechtling, Visiting Professor of Tourism Administration, The George Washington University

PANEL:

- Thomas R. Crosby, Managing Director, American Automobile Association Travel Publishing
- David A. Swierenga, Assistant Vice President - Airline Industry Data, Air Transport Association of America

SESSION II: Outlook for Accommodations and Attractions

MODERATOR:

- Joan McClellan, President, McClellan Corporation International and President, Travel and Tourism Research Association

PANEL:

- Mark V. Lomanno, Research Manager, Smith Travel Research (His appearence is sponsored by ***American Hotel & Motel Association***.)
- Dr. Conway Rucks, D.B.A., President, Marketing Information Technologies, Inc.

2:45-3:00 PM

COFFEE BREAK

Sponsored by USA Weekend

CONCURRENT SESSIONS

3:00-4:15 PM

SESSION I: Outlook for Business Travel Panel

- Elizabeth M. Stewart, Manager of Market Research, U.S. Travel Data Center
- Nan K. Moss, Assistant Vice President of Marketing Programs, Hyatt Hotels Corporation
- John Riener, President, Carlson Travel Network - Commercial
- Beverly D. Shipka, Economist/Manager, Macro Forecasting, American Airlines

SESSION II: Leisure/Family Vacation Travel Panel

- Peter Mason, Travel Classification Manager, *Better Homes & Gardens*
- Tom R. Frenkel, CTP, Vice President, Presley Tours, Inc.
- Helen N. Marano, Research Manager, Orlando/ Orange County Convention & Visitors Bureau, Inc.
- Barbara Wickliffe, Director of Marketing Planning and Research, Best Western International, Inc.

4:15-5:00 PM

GENERAL SESSION:

"While the 1990's Haven't Even Started, The Consumers Are Already In The 21st Century"

- Watts Wacker, Executive Vice President, Yankelovich Clancy Shulman

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	LAST PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	JULY	$5,910	millions	-9.7	7.9	5.4
Eating and Drinking Places (2)	AUG	$16,978	millions	-0.8	-5.1	1.9
Gasoline Service Stations (2)	AUG	$11,062	millions	-1.9	-3.0	-2.5
Consumer Lodging Demand						
Hotels/Motels Occupancy Rates (3)	JULY	62.9	percent	0.8	2.4	2.8
Real Demand For Commercial Lodging (4)	JULY	72.8	millions	0.5	5.4	4.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	AUG	36.8	billions	4.0	12.7	4.3
Int'l Revenue Passenger Miles	AUG	13.7	billions	6.2	2.1	16.6
Highway Traffic Volume (6)						
Rural Arterial Vehicle Miles	JUNE	50,048	millions	1.8	2.7	4.5
	JULY	53,821	millions	7.5	3.1	4.3
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	JULY	581.4	millions	29.1	-3.8	-3.9
Travel Price Index (8)						
(1982-1984 = 100)	AUG	151.8		0.3	2.8	2.5
Visitor Vol. at National Park Service Areas (9)						
Recreational Visits	JULY	41.2	millions	26.0	-0.4	2.9
	AUG	39.0	millions	-5.1	-1.0	2.1
Overnight Stays	JULY	3.5	millions	46.6	1.0	5.0
	AUG	3.5	millions	-2.0	-5.0	2.0
Foreign Arrivals to the United States						
From Overseas (10)	MAY	1,474,751		12.3	5.4	19.1
	JUNE	1,551,099		5.2	6.9	16.5
From Canada (11)	JULY	2,405,502		83.3	-8.0	0.1
From Mexico (10)	MAY	104,413		-17.8	-6.3	7.4
	JUNE	126,303		21.0	5.1	7.0
U.S. Citizen Departures						
To Canada (11)	JULY	2,079,776		43.8	0.5	-0.2
Domestic Demand For Motor Gasoline (12)						
Barrels Per Day	JULY	7,618	thousands	2.2	0.8	1.1

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) National Parks Service, preliminary, unadjusted for differences in reporting units. (10) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (11) Statistics Canada. (12) U.S. Department of Energy, prelim.

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